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ABSTRACT

This resource package contains an administrator's manual and nine instructor guides designed to assist local education agency personnel in the development of functional and systematic procedures for identifying and assessing the needs of special students enrolled in vocational education programs. The administrator's manual provides a description of the three-phase identification and assessment system and suggests procedures for implementation and evaluation. The first instructor's guide presents a description of the system and briefly describes how the information offered in Guides 2-9 fits together to provide a workable structure for the continuous assessment of student needs and progress in vocational education. The remaining eight instructor guides provide guidelines for the following activities: identifying students with special needs (Guide #2); assessing the student's present level(s) of performance (Guide #3); preparing an individualized vocational plan (Guide #4); using the training plan in concurrent work-education programs (Guide #5); assessing vocational skill development (Guide #6); monitoring the student's individualized vocational plan (Guide #7); conducting student follow-up (Guide #8); and conducting employer follow-up (Guide #9). Guides 2-9 also include sample reports and related forms. (BM)

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ADMINISTRATOR'S MANUAL FOR THE IDENTIFICATION AND ASSESSMENT SYSTEM

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Bureau of Educational Research
University of Illinois
at Urbana-Champaign

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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Administrator's Manual for the Identification and Assessment System

Tim L. Wentling and Len Albright

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INTRODUCTION

The materials within this resource package are designed to assist local education agency personnel in improving the quality of instruction and supportive services provided to students with special needs[1] enrolled in vocational education programs. The package contains a series of nine guides for persons who provide direct instruction and/or supportive services to the student with special needs and a manual for administrative personnel who are responsible for managing the delivery of vocational education and supportive services to special learners.

The focus of the nine guides is on the development of functional and systematic procedures for identifying and assessing the needs of special students. This manual is to aid the administrator in implementing a comprehensive identification and assessment system and in evaluating the programs and supportive services provided to students with special needs.

The administrative manual consists of three sections. The first section briefly describes a three-phase identification and assessment system and points out the various types of information available to the administrator from the activities conducted within each phase. Section two offers a series of suggested steps for initiating and implementing an identification and assessment system within the local education agency. The third section provides suggestions and procedures for conducting an overall evaluation of the programs and services provided to students with special needs.

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[1] The phrase "students with special needs" refers to individuals who have been identified as having a handicap or a disadvantage, and who require special assistance, services and programs in order to enable them to experience success within vocational education settings.

SECTION I:

Overview of the Identification and Assessment System

INTRODUCTION

Included within the instructor guides are strategies for collecting learner performance information and for coordinating the efforts of instructional and supportive services personnel. Much of the information collected by these individuals can be used by the program manager or the administrator in implementing the assessment system (Section II). This information can also be used in evaluating the efficiency and the effectiveness of the instruction and services delivered to students with special needs (Section III).

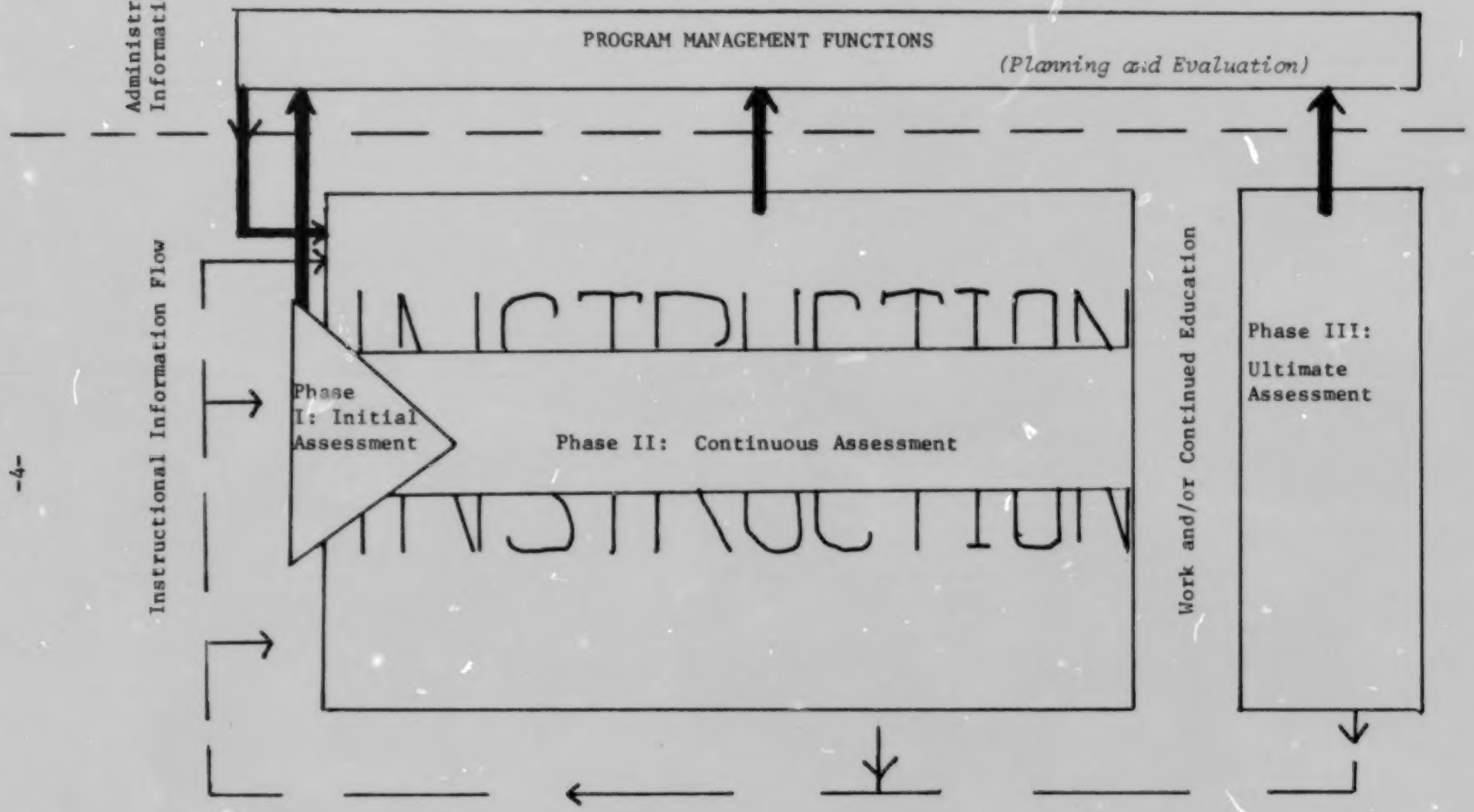
The purpose of this section is to provide a brief overview of the identification and assessment system. The major phases of the system and the types of information the administrator can expect to receive from the outcomes of the activities conducted within each phase are indicated.

SYSTEM OVERVIEW

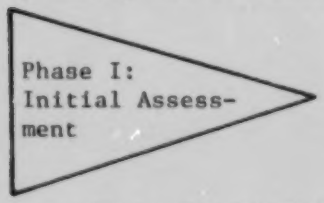
The identification and assessment system is set into motion at the point when the special student is referred and identified, and continues on through the preparation of an Individualized Vocational Plan, the on-going assessment of learner progress in classroom and laboratory settings, with the final step being a follow-up of the student in the world of work. Figure 1 on page 4 offers a graphic illustration of the system for identifying and assessing the student with special needs enrolled in a vocational program.

The system is divided into three phases according to the chronological progression of a student through an instructional program. As depicted in Figure 1, the three phases include: 1) initial assessment,

Figure 1 - Special Needs Identification and Assessment System



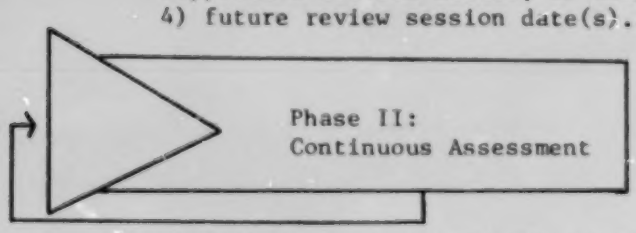
2) continuous assessment, and 3) ultimate assessment activities. The activities within Instructor Guides 2 through 9 tie into each phase of the system. Let's now take a look at the activities conducted within each phase and determine the types of information available for program planning and evaluation purposes.



Phase I activities relate to the initial identification and assessment of, and the individualized planning for, the special student. Initial assessment activities are to take place prior to, and/or during the first three weeks of the instructional program. Guide 2 focuses on the procedures for referral and identification of the special learner within the local education agency. A teacher, counselor or parent initiated referral of a student to the appropriate person (e.g., counselor) begins the process for determining the specific vocational-educational needs of this particular learner (Guide 3). Once learner strengths and weaknesses are identified, then an individualized instruction and supportive services plan is prepared for the student (Guide 4).

The outcome or products resulting from completion of these activities include:

- Information on the number of students referred and the number classified as having a handicap or a disadvantage.
- Data on the type, extent and frequency of the problems referred.
- A series of Individualized Vocational Plans (IVP's) for special needs learners. Each should provide information on: 1) annual goals and short-term instructional objectives, 2) type(s) of supportive service needed, 3) composition of IVP team and 4) future review session date(s).

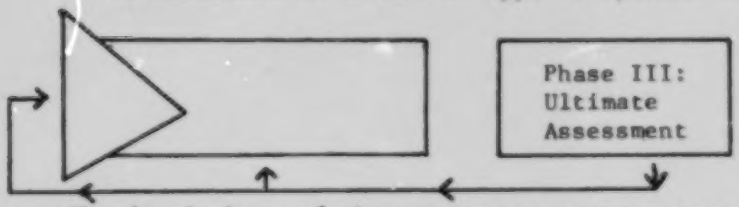


Continuous assessment involves the monitoring of student progress throughout instruction. The training plan is often used in combined work-education programs to organize and coordinate the learner's in-school instruction and on-the-job training. The training plan

can also be used as a tool for periodically assessing learner progress (Guide 5). Specific assessment of learner performance during a task and/or an assessment of the outcomes of learner performance on a task is essential for instructional decision-making (Guide 6). A procedure for collecting and recording student progress information is helpful in determining modifications which need to be made in the learner's IVP. This procedure is presented in Guide 7.

The outcomes of the activities completed in Phase II include:

- Performance progress record for each student with special needs, providing continuous progress data on vocational skill development and on learner growth within supportive service areas.
- Indication of specific problem(s) the learner is experiencing.
- Information on specific modifications needed in the learner's individualized plan including: 1) instructional content changes, 2) methods and/or materials changes, and 3) expansion or reduction in extent or type of special services needed.



The final phase of the assessment system occurs after the learner has completed the vocational program and has entered the world of work and/or continues her or his education. The purposes of ultimate assessment are to determine the learner's adjustment in work and/or school settings and to identify the areas within the instructional program which may need to be revised or expanded in order to strengthen the instruction provided to future special needs learners. Two strategies for obtaining this information are the student follow-up (Guide 8) and the employer follow-up (Guide 9).

The outcomes of student and employer assessment activities could include:

- Data on student placement.
- Former student self-report on skill deficiencies and needs.
- Observations of job advancement, retention or turnover.
- Former student and employer indication of student's adjustment problems.

- Employer rating of specific job skill possession.
- Employer rating of general job skills, e.g., employer-employee relations, work attitudes.

For additional information on the content and use of each instructor guide refer to Instructor Guide #1.

SECTION II:

Developing and Implementing a Special Needs Identification and Assessment System

INTRODUCTION

This section offers a series of suggested steps for implementing a special needs identification and assessment system within a local education agency. It is recognized, however, that the process of implementation will vary in every local educational agency (LEA). Therefore, it is anticipated that the general guidelines suggested herein will be adapted and changed to reflect the particular needs of each institution.

PROCEDURES FOR IMPLEMENTING THE SYSTEM*

Step 1: Identify key staff to guide the implementation process.

A. Include instructional, support services and administrative personnel as the key staff to provide leadership to the implementation effort.

B. Make an attempt to involve individuals who are recognized as leaders among their peers. This should facilitate the acceptance of the implementation activities by others within the LEA.

C. Keep the number of key staff small (5 to 10, based on size of LEA).

Step 2: Determine the LEA's current level of activity in the identification and assessment of special needs learners.

A. Assemble group identified in Step 1.

B. Discuss current practices within the LEA.

C. Complete the first part of Guide #2 (review of existing identification criteria, procedures and forms).

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*The procedures suggested within the instructor guides were implemented and evaluated by teams of special and vocational educators, counselors and administrators from five school districts and were revised according to evaluative data received during the field test period. The administrative procedures suggested in this section were developed after the field test phase of the project, but are based on the experiences gained from the field testing process.

Step 3: Discuss the identification and assessment system presented in this resource package.

A. Duplicate Instructor Guides 1 through 9.

B. Distribute Instructor Guides to key staff for their review.

C. Meet with key staff to discuss the system, its phases and corresponding activities.

D. Discuss how the system and its components relate to current practices and felt needs.

Step 4: Select activities that will be targeted for emphasis in the LEA.

A. Discuss the needs of the LEA in comparison with the activities presented in Guides 2-9.

B. Select segments of the identification and assessment system which will be emphasized or targeted during the implementation process.

C. Identify the number of staff to be involved in each target area. Consider both instructional and support services staff in this count.

Step 5: Assign leadership responsibilities for each target area.

A. Each activity to be undertaken will likely involve many people. Therefore, one or two individuals should assume the leadership for carrying out each target area.

B. Leaders may be selected from the group of key persons identified in Step 1 or from others in the LEA.

Step 6: Establish a calendar for completion of the selected target activities.

A. Establish a starting date for each activity, based upon the knowledge gained from review of the information contained in Instructor Guides 1-9.

B. Ask each leader to study her/his respective instructor's guide, re target area, and to provide a time estimate and a projected completion date.

C. Compile all time information into a common calendar for the implementation of the identification and assessment system.

D. Distribute a copy of the calendar to key staff group.

Step 7: Establish working teams for each targeted activity.

A. Select a group of individuals who will be involved in or affected by a particular part of the identification and assessment system.

B. The size of the working group could vary depending on the type and the relative importance of the activity to be completed. If, for instance, an activity such as developing a student referral form is chosen, then the composition of the working team will likely be small. But, if an activity chosen is more complex, such as developing Individual Vocational Plans, then a larger number of persons will need to be involved.

Step 8: Organize working and/or inservice sessions for teams.

A. Duplicate needed materials, including copies of the Instructor Guides.

B. Obtain additional information from "FOR FURTHER INVESTIGATION" list within each Instructor Guide.

C. Identify external resource people for assistance with the implementation of the system components or in the conduct of the inservice sessions.

D. Hold meetings to present the inservice information to the teams. The first meeting could include a discussion of Instructor Guide #1 and how the information within it relates to the implementation effort.

E. Hold meetings to finalize procedures to be used by each team in completing the respective activity(ies), to delineate member responsibilities, and to discuss information related to the activity or activities undertaken.

Step 9: Each team leader submits a "Plan of Action" for team activity.

A. A list of tasks related to completion of the team's activity area is provided.

B. A schedule for task completion is included.

C. A list of resources needed for completion of each task is also indicated within the action plan.

Step 10: Monitor implementation of total identification and assessment system.

A. Assemble the action plans from the individual leaders.

B. Periodically meet with individual team leaders to review system progress and needs (e.g., once per month).

C. Revise action plans to reflect information gained from team leader meetings.

D. Obtain informal and/or formal feedback from staff, students, parents, advisory committee(s) regarding the effectiveness of the identification and assessment system and its various parts.

E. Revise procedures within the system as necessary to make them more efficient and effective.

SECTION III:

Evaluating the Supportive Services Provided to Students With Special Needs

INTRODUCTION

The need for program or service evaluation requires little elaboration since educators are continuously attempting to improve their efforts. Also, the need to keep the various constituencies (e.g., parents, state agencies, school board) informed of the needs and progress of the LEA contributes to the rationale for conducting program and service evaluation. The purpose of this section is to offer several strategies for evaluating the supportive services provided to students with special needs in vocational education.

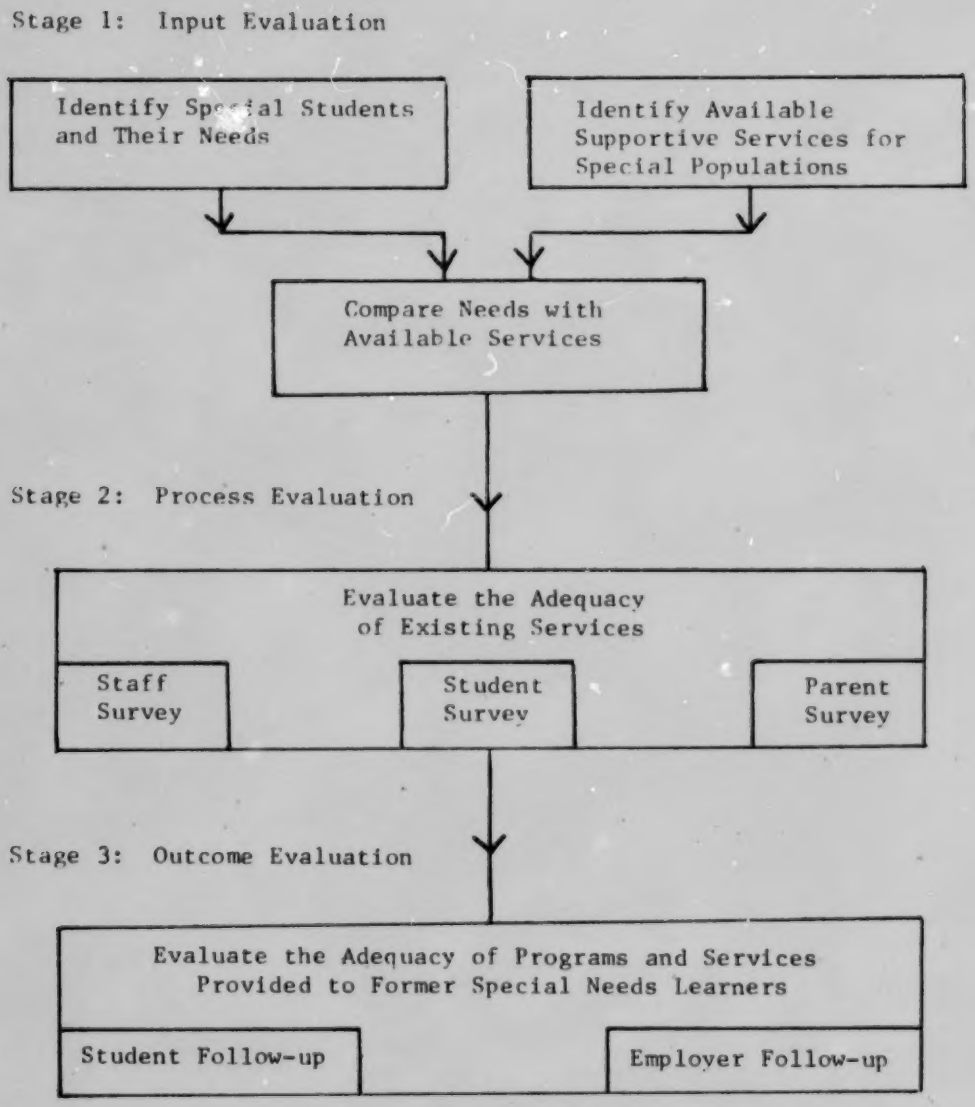
GUIDELINES AND CONSIDERATIONS*

The evaluation of instruction and supportive services provided to individuals with special needs does not require the initiation and implementation of a totally new and separate structure or system. Instead, the results of the activities described within the three phases of the identification and assessment system (Section I) can be augmented to form the overall evaluation system. Also, an on-going evaluation system for all vocational or all educational programs may already exist and may require few if any changes.

The three stage evaluation system suggested in this section and displayed in Figure 2 on page 15 is mainly concerned with evaluating the supportive services provided to special needs learners. Each stage encompasses two or more components or activities to be completed. Each stage may be conducted independently of one another and may suffice as an evaluation in itself. The ideal, however, is to complete all three stages of the evaluation structure.

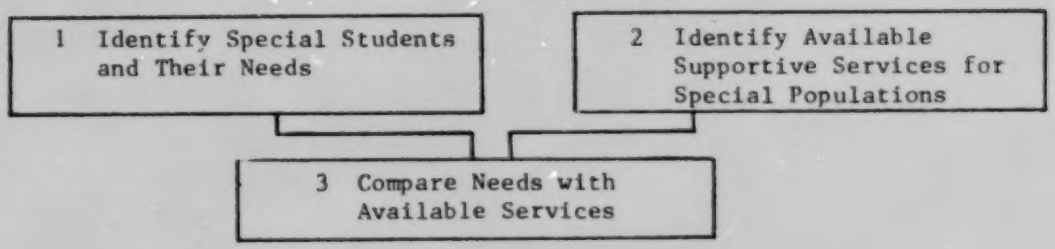
*The information presented in this section is based on Chapter 7 of Wentling, Tim L., Evaluating Occupational Education and Training Programs. 2nd Edition. Boston, Mass.: Allyn and Bacon, Inc., 1979.

Figure 2 - Schematic of Evaluation System
for Supportive Services


Stage 1: Input Evaluation
Identify Special Students and Their Needs
Identify Available Supportive Services for Special Populations
Compare Needs with Available Services
Stage 2: Process Evaluation
Evaluate the Adequacy of Existing Services
Staff Survey
Student Survey
Parent Survey
Stage 3: Outcome Evaluation
Evaluate the Adequacy of Programs and Services Provided to Former Special Needs Learners
Student Follow-up
Employer Follow-up

Stage one of the evaluation structure incorporates three major components and is typically conducted prior to, or at the beginning of the school year. These components are shown below.

Stage 1 - Input Evaluation


1 Identify Special Students and Their Needs
2 Identify Available Supportive Services for Special Populations
3 Compare Needs with Available Services

Component 1 - Identify Special Students and Their Needs

If the activities suggested in Instructor Guides 2, 3 and 4 have been completed, then this component involves only the compilation or aggregation of information which has already been collected.

Step 1. Collect all referral forms for current student population (Instructor Guide #2).

Step 2. Collect description of student's present level of performance (Instructor Guide #3 or #4).

Component 2 - Identify Available Services for Special Populations

This component may be completed through review of the IVP's described in Instructor Guide #4 or it may assume a broader perspective through the conduct of a resource inventory. An inventory of all potential services for special needs learners may provide excellent input to the planning of future programs and the future development of IVP's. However, it is not crucial to the evaluation process.

Step 1. (Optional) Conduct an inventory of available services and resources. (See Chapter 7 in Phelps, L. Allen and Lutz, Ronald J. Career Exploration and Preparation for the Special Needs Learner, Boston, Mass.: Allyn and Bacon, Inc., 1977, for detailed procedures.)

Step 2. Review IVP's and list each type of service included.

Step 3. Tally the number of amounts of service by type.

Component 3 - Compare Needs with Available Services

This component involves the integration of the information gathered through components 1 and 2. The outcome of component 3 should be a matrix which presents the number of learners who possess various needs and an indication of services that are available. This matrix should be of use to program managers or administrators in identifying voids in services or in making decisions regarding the need for expansion or contraction of existing services.

Step 1. Prepare a form which includes a needs by services matrix (see Example Document #1).

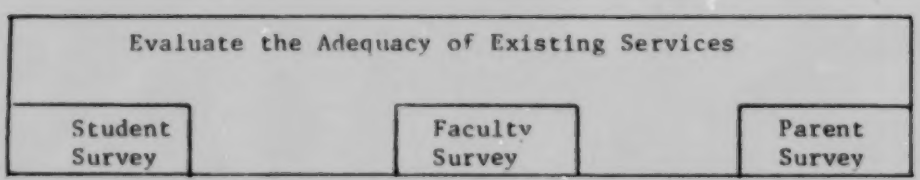
Step 2. Insert the number of students within each of the appropriate matrix cells.

Step 3. Review the completed matrix for voids in services.

Step 4. Prepare a short evaluation report using the findings of the matrix analysis to justify requests for additional or revised services.

Stage two of the service evaluation system involves the collection of information regarding the effectiveness of existing services and involves obtaining feedback on services provided to special learners currently enrolled in the vocational program. This information will be in the form of ratings or open-ended feedback from students, parents and staff.

Stage 2 - Process Evaluation



Step 1. Determine what you want to know about special needs services.

Step 2. Prepare a series (2-10) of broad key evaluation questions (see Example Document #2).

Step 3. Prioritize key evaluation questions.

Step 4. Write rating items for each key question (you may change the wording of items for each of the three groups) (see Example Documents #3 and #4).

Step 5. Assemble items into three questionnaires.

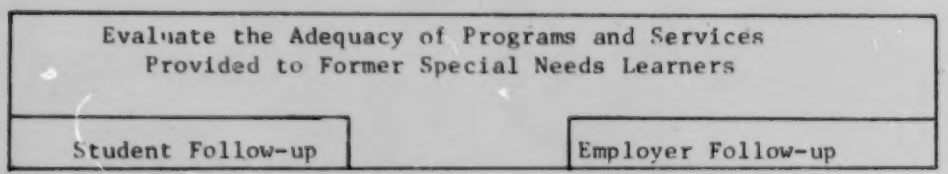
Step 6. Duplicate and distribute questionnaires to students, parents, and faculty.

Step 7. Summarize results by tabulating items for each key evaluation question.

Step 8. Compare results from the three groups and make judgments about the range, use and availability of existing supportive services and formulate conclusions and recommendations.

The last stage, stage 3, of the service evaluation system integrates the results from Instructor Guides #8 and #9. These include the conduct of a student follow-up survey and the follow-up of the employer of former special needs learners. The last stage is shown below.

Stage 3 - Outcome Evaluation


Evaluate the Adequacy of Programs and Services
Provided to Former Special Needs Learners
Student Follow-up
Employer Follow-up

Step 1. Collect tabulated responses and/or report prepared for the student follow-up (Instructor Guide #8).

Step 2. Collect tabulated responses and/or report prepared for the employer follow-up (Instructor Guide #9).

Step 3. Review the results and formulate a series of conclusions.

Step 4. Ask other staff or faculty members to verify or add to conclusions.

Step 5. Brainstorm a series of potential actions that might remedy deficiencies identified in negative conclusions.

Step 6. Ask other staff or faculty to add to and prioritize suggested improvements.

Step 7. Present suggested improvements in the form of a "Plan of Action" with timelines and personnel responsibilities delineated.

Step 8. Distribute "Plan of Action" to involved staff.

Step 9. Monitor implementation and completion of "Plan of Action."

FOR FURTHER INVESTIGATION

For additional information on evaluating programs and services see:

Austin, J. J. and Sommerfeld, D. An Evaluation of Vocational Education for Disadvantaged Youth. Muskegan Public Schools, Muskegan, Michigan, 1967.

Biehl, G. Richard. Guide to Section 504 Self-Evaluation for Colleges and Universities. Washington, D.C.: National Association of College and University Business Officers, January, 1978.

Davis, Dwight and Borgen, Joe. Planning, Implementing and Evaluating Career Preparation Programs. Bloomington, Illinois: McKnight Publishing Company, 1974.

Erickson, Richard C. and Wentling, Tim L. Measuring Student Growth: Techniques and Procedures for Occupational Education. Boston, Mass.: Allyn and Bacon, Inc., 1976.

Gallagher, J. L. "Program Planning and Evaluation: First Chance for Children." Project Report for Technical Assistance Development System. University of North Carolina, Chapel Hill, N.C., 1972.

Handbook for Self-Evaluation of Programs and Services for Disadvantaged and Handicapped at Community Colleges under the V.E.A. of 1968. Tadlock Associates, Los Altes, Cal., 1972.

Meyer, Judy. Self-Evaluation Guide for Local Districts for Vocational Education of Handicapped Students. Houston, Texas: Center for Human Resources, College of Business Administration, University of Houston, 1972.

National Accreditation Council for Agencies Serving the Blind and Visually Handicapped. "Self Study and Evaluation Guide for Sheltered Workshops." American Foundation for the Blind. New York: New York Social Rehabilitation Services, DHEW, 1968.

Phelps, L. Allen and Lutz, Ronald J. Career Exploration and Preparation for the Special Needs Learner. Boston, Mass.: Allyn and Bacon, Inc., 1977.

State of Minnesota, "Program Review for Special Needs." Division of Vocational and Technical Education, Minnesota Department of Education, St. Paul, 1977.

Tindall, L. W. "Program Evaluation and Planning for the Vocational Education of Handicapped Students." Madison: Vocational Studies Center, University of Wisconsin, 1977.

Torres, Scottie, Project Director. Special Education Administrative Policies Manual. Reston, Va.: Council for Exceptional Children, 1977.

Wentling, Tim L. Evaluating Occupational Education and Training Programs. 2nd Edition. Boston, Mass.: Allyn and Bacon, Inc., 1979.

Wentling, Tim L., Project Director. Local Leader Guides 2, 3 and 13. In Locally-Directed Evaluation: Handbooks 1 and 2. Springfield, Illinois: Division of Adult, Vocational and Technical Education, Illinois Office of Education, 1976.

Wood, M. W. Criteria for Evaluation of Programs Resulting from Federal Legislation: Evaluation of Programs for Students with Special Needs. National Business Education Association Yearbook, 1969.

EXAMPLE DOCUMENT #1

STUDENT CHARACTERISTICS AND SERVICES MATRIX*

HANDICAPS	Total Enrolled	Projected Next Year	Special Vocational Class	Reader/Interpreter	Remedial Instruction/Therapy	Instructional Aids/Tutors	Instructional Materials	Educational Testing & Diagnosis	Extended School Day/Week/Term	Special Guidance and Counseling	Work Performance Evaluation/Follow-up	Social Work & Family Involvement	Special Transportation	Field Trips	Modification of Facilities	Special Equipment	Modification of Equipment	Job Placement and Follow-up	Other
A. Mentally Retarded																			
B. Learning Disability																			
C. Seriously Emotionally Disturbed																			
D. Orthopedically Handicapped																			
E. Visually Handicapped																			
F. Hearing Impaired																			
G. Speech Impaired																			
H. Other Health Impaired																			
I. Multiple Handicapped																			

*Adapted from a form appearing in Guide #13, Assessment of Services for the Disadvantaged and Handicapped. In Locally-Directed Evaluation: Handbook 2. Tim L. Wentling, Project Director. Springfield, Illinois: Illinois Office of Education, 1976. Reprinted with permission from author.

DISADVANTAGES

A. Academically
   1. Language (Speaking)
   2. Reading and/or Writing
   3. Computational
   4. General

B. Economically Disadvantaged

C. Other Remediable Effects

Total Enrolled	Projected Next Year	Special Vocational Class	Reader/Interpreter	Remedial Instruction/Therapy	Instructional Aids/Tutors	Instructional Materials	Educational Testing & Diagnosis	Extended School Day/Week/Term	Special Guidance and Counseling	Work Performance Evaluation/Follow-up	Social Work & Family Involvement	Special Transportation	Field Trips	Modification of Facilities	Special Equipment	Modification of Equipment	Job Placement and Follow-up	Other

EXAMPLE DOCUMENT #2

KEY EVALUATION QUESTIONS FOR
SPECIAL NEEDS SERVICES

1. To what extent are the supportive services identified in the Individual Vocational Plans being used?

2. Are regular vocational instructors aware of the range of supportive services that exist for special needs learners?

3. Do instructional materials such as books, handouts, etc., meet the appropriate reading level needs of students?

4. Is there a need to modify equipment in the laboratories to better meet the needs of orthopedically handicapped learners?

5. Are interpreter, reader, and tutorial services readily available to students?

6. Are counselling services adequate for special needs learners?

7. Are special tutors utilized by those who most need them?

8. Does the placement center discriminate against special needs students?

9. Are parents aware of services that their son or daughter may take advantage of?

10. What kinds of services do students think they need?

EXAMPLE DOCUMENT #3

EXAMPLE ITEMS FOR THE STAFF RATING FORM*

1. Were you involved in the development of an Individualized Vocational Plan for each special student that you provide instruction and/or services to? YES ___ NO ___

   If no, please explain. _____

   _____

2. Do you provide supportive or special services to learners with special needs? YES ___ NO ___

   If yes, what are they? _____

   _____

3. Are you interested in attending an inservice training program to improve services to students with special needs? YES ___ NO ___

   If yes, make suggestions of areas of interest to you. _____

   _____

4. What services could your students benefit from, but are not presently available? _____

   _____

5. Do you know where to refer students for special services? YES ___ NO ___

   If no, list ways of making this information available to staff. _____

   _____

Check the services you are aware of, then rate the effectiveness of each by circling the number that best describes it at the right.

	Highly Effective	Effective	Ineffective	Highly Ineffective
__ Guidance and counseling	1	2	3	4
__ Individualized teaching	1	2	3	4
__ Special materials	1	2	3	4
__ Recreational and physical education facilities	1	2	3	4
__ Job placement at graduation	1	2	3	4
__ Child care facilities	1	2	3	4
__ Resource center	1	2	3	4
__ Psychological services	1	2	3	4
__ Tutors	1	2	3	4
__ Youth organizations	1	2	3	4
__ Summer programs	1	2	3	4
__ Student employment	1	2	3	4
__ Remedial teachers	1	2	3	4
__ Special vocational classes	1	2	3	4

*Revised version of a form appearing in Guide #13, Assessment of Services for the Disadvantaged and Handicapped. In Locally-Directed Evaluation: Handbook 2. Tim L. Wentling, Project Director. Springfield, Illinois: Illinois Office of Education, 1976. Reprinted with permission from author.

	Highly Effective	Effective	Ineffective	Highly Ineffective
__ Ramps, elevators	1	2	3	4
__ Interpreters	1	2	3	4
__ Brailled books	1	2	3	4
__ Note taking services	1	2	3	4
__ Student aides	1	2	3	4
__ Sound devices	1	2	3	4
__ Special equipment	1	2	3	4
__ Special lighting	1	2	3	4
__ Transportation	1	2	3	4
__ Health services	1	2	3	4
__ Bilingual/bicultural classes	1	2	3	4
__ Free or loaned clothing	1	2	3	4
__ Free or loaned school materials	1	2	3	4
__ Financial aid	1	2	3	4
__ Free or discount cafeterial service	1	2	3	4

EXAMPLE DOCUMENT #4

EXAMPLE ITEMS FOR THE STUDENT RATING FORM*

Check the services which are (were) provided to you during this school year. Then rate the value of the service to you by circling the number that best describes it at the right.

		Excellent	Good	Fair	Poor
___	Guidance and counseling	1	2	3	4
___	Individualized teaching	1	2	3	4
___	Special materials	1	2	3	4
___	Recreational and physical education facilities	1	2	3	4
___	Job placement at graduation	1	2	3	4
___	Child care facilities	1	2	3	4
___	Resource center	1	2	3	4
___	Psychological services	1	2	3	4
___	Tutors	1	2	3	4
___	Youth organizations	1	2	3	4
___	Summer programs	1	2	3	4
___	Student employment	1	2	3	4
___	Remedial teachers	1	2	3	4
___	Special vocational classes	1	2	3	4
___	Ramps, elevators	1	2	3	4
___	Interpreters	1	2	3	4
___	Brailled books	1	2	3	4
___	Note taking services	1	2	3	4
___	Student aides	1	2	3	4
___	Sound devices	1	2	3	4
___	Special equipment	1	2	3	4
___	Special lighting	1	2	3	4
___	Transportation	1	2	3	4
___	Health services	1	2	3	4
___	Bilingual/bicultural classes	1	2	3	4
___	Free or loaned clothing	1	2	3	4
___	Free or loaned school materials	1	2	3	4
___	Financial aid	1	2	3	4
___	Free or discount cafeteria service	1	2	3	4

*Adapted from a form appearing in Guide #13, Assessment of Services for the Disadvantaged and Handicapped. In Locally-Directed Evaluation: Handbook 2. Tim L. Wentling, Project Director. Springfield, Illinois: Illinois Office of Education, 1976. Reprinted with permission from author.

1

INTRODUCTION TO THE IDENTIFICATION AND ASSESSMENT SYSTEM

Bureau of Educational Research
University of Illinois
at Urbana-Champaign

1

INSTRUCTOR'S GUIDE

INTRODUCTION TO THE IDENTIFICATION AND ASSESSMENT SYSTEM

Special Needs Identification and Assessment Project
Bureau of Educational Research
University of Illinois
at Urbana-Champaign

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The report presented herein was prepared pursuant to Grant No. OEG007604835 from the Bureau of Occupational and Adult Education, U.S. Office of Education, Department of Health, Education and Welfare. The opinions expressed herein, however, do not necessarily reflect the position or policy of the U.S. Office of Education and no official endorsement should be inferred.

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PREFACE

This resource package contains a series of nine guides related to the identification and assessment of students with special needs[1] enrolled in vocational education programs. Its central goals are: 1) to assist local education agency personnel in the development of functional procedures for determining the needs of special learners, and 2) to provide local education agency personnel with a systematic process for coordinating and evaluating the instructional programs and supportive services delivered to students with special needs.

The nine guides are to serve as practical aids for vocational, special and remedial education instructors, coordinators and counselors who are, or who will be, involved in preparing, implementing and evaluating individualized vocational-educational programs for students with special needs. This guide, Guide 1, presents a three-phase assessment system and briefly describes how the information offered in Guides 2 through 9 fits together to provide a workable structure for the continuous assessment of student needs and progress in vocational education.

The guides can be used on an individual basis, or by instructional and support service personnel in cooperative planning sessions. The latter approach was emphasized during the field testing of these materials and should increase both the efficiency and the effectiveness of planning for students with special needs.

---

[1] The phrase "students with special needs" refers to individuals who are being considered for, or who are enrolled in secondary or post-secondary vocational education programs and who, due to the effects of disability, disadvantage or dysfunctional school placement, need additional instruction and supportive services in order to succeed within educational and/or employment settings (Phelps, L. Allen, Someone with Special Needs: An Alternative Definition. Illinois Career Education Journal, 33 (2), 1976).

ACKNOWLEDGEMENTS

The development, formative field test evaluation and revision of the products within this resource package are a result of the contributions of many professionals. The preparation of these products would not have been possible without the collective wisdom and experience of individuals from local, state and university sectors. The project and adjunct staff, field test participants and steering committee were essential to the success of the project. They are listed on pages 3 through 6.

Very special credit is due two persons who conceived this project and who provided important ideas, encouragement and assistance throughout the project, L. Allen Phelps and Tim L. Wentling.

We are indebted to Robert M. Tomlinson for directing the first stages of the project, and to Ronald Hutchinson, Raymond Randolph and Kurt Braun for their assistance during this formative period. Steve Everett and Frank Rusch helped greatly by critiquing the first draft of the revised products during the final stages of the project.

We appreciate the cooperation of Allyn and Bacon, Inc., McGraw-Hill Book Company, McKnight Publishing Company and South-Western Publishing Company and the authors cited herein for permission to adapt some of their materials.

Finally, we wish to acknowledge the support received from the Bureau of Educational Research staff, under the direction of Dr. William McLure. Mrs. Carma Diel, Sherrill Mohr, and Karen Chelsvig provided competent and efficient clerical and editorial assistance.

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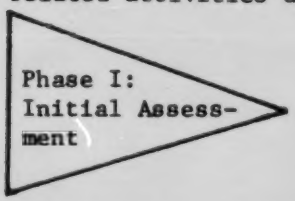
DESCRIPTION OF THE THREE-PHASE ASSESSMENT SYSTEM

Guides 2 through 9 represent the major components of a system for assessing the instructional and supportive service needs of students with special learning, behavioral and/or physical difficulties. This section provides a brief overview of how the components go together to provide a comprehensive design for identifying student needs and for monitoring student progress.

Figure 1 on page 9 graphically illustrates the assessment system and identifies each of the guides. The system is divided into three phases according to the chronological progression of the student through an instructional program. As seen in Figure 1, the three phases include initial, continuous and ultimate assessment activities. Each phase and related activities are described below:



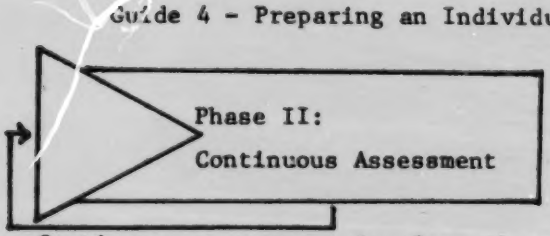
The purpose of initial assessment activities is to assess the specific vocational-educational needs of the special learner. It is at this stage that the learner's present level of performance is determined and an individualized instructional and supportive services plan is developed. Initial assessment activities are to occur prior to, and/or during the first three weeks of the instructional program.

The instructor resource guides related to Phase I activities are:

Guide 2 - Procedures for Identifying Students with Special Needs

Guide 3 - Strategies for Assessing the Student's Present Level(s) of Performance

Guide 4 - Preparing an Individualized Vocational Plan



Continuous assessment involves the systematic monitoring of student progress throughout the school year. By maintaining an on-going record of student performance, the instructor has a clearer picture of individual student progress and is able to describe specific areas of strength and weakness to the student and to those involved in developing the learner's individualized vocational plan. This up-to-date progress information is to be used to identify specific modifications which need to be made in

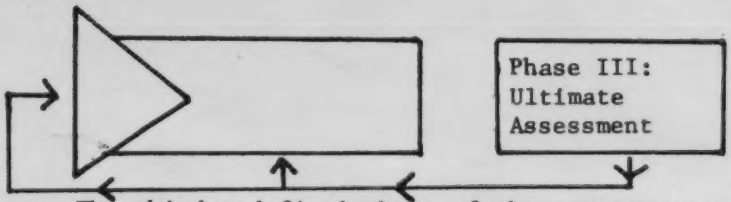
the learner's individualized vocational plan and for evaluating learner achievement near the time of completion of the vocational course or program.

The instructor guides related to continuous assessment activities include:

Guide 5 - The Use of the Training Plan in Concurrent Work-Education Programs

Guide 6 - Assessing Vocational Skill Development

Guide 7 - Monitoring the Student's Individualized Vocational Plan



The third and final phase of the assessment system centers on one of the ultimate goals of the vocational program--preparing the individual for productive employment in society. Hence, a major purpose of ultimate assessment is to determine the learner's performance, following completion of the vocational program, in the world of work and/or in continued education. In addition to providing information on student adjustment, ultimate assessment activities can provide the vocational instructor with a means for identifying the skills currently required for on-the-job success. Both student adjustment and job performance information should be helpful in providing vocational instruction to future special needs learners.

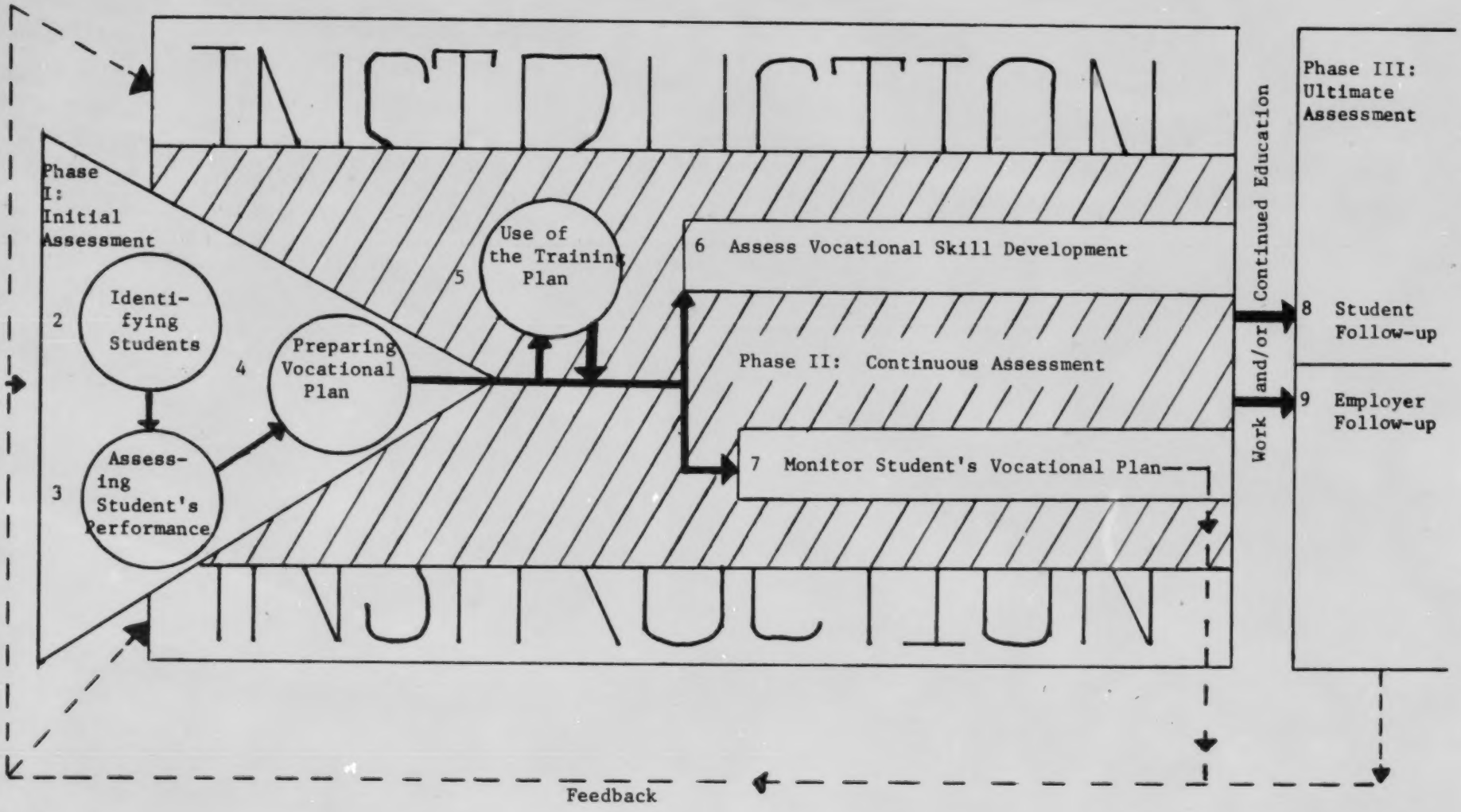
Two instructor guides pertain to ultimate assessment activities:

Guide 8 - Conducting Student Follow-up

Guide 9 - Conducting Employer Follow-up

While the assessment system does offer a number of procedures for monitoring the progress of the special learner, the basic strategies and ideas employed within this system are not new to the field of education. Most instructors are already assessing learner needs and collecting student progress data for instructional decision-making. These instructors should find that the suggestions offered herein reinforce their on-going efforts.

Figure 1 - Special Needs Identification and Assessment System



USE AND DESCRIPTION OF THE INSTRUCTOR GUIDES

Use and Format of Guides

The nine guides are designed for use by vocational, special and remedial education instructors, coordinators and counselors. Although the guides are integrated in a sequential pattern, it is not necessary that all be used, nor that they be employed in their numbered sequence. Each guide has been developed to "stand on its own." The decision as to the use of some or all of the guides will depend on the program and staff needs at each local education agency. It is expected that each reader will find a different way to make use of the information in this resource package.

The format within Guides 2 through 9 is uniform. In addition to a table of contents, each guide has four parts. Each part is briefly described below:

Introduction - This section explains the *purpose* and the *importance* of the activity presented in the guide.

Guidelines and Considerations - This part provides key information and suggestions for planning and/or conducting the activity under consideration.

For Further Investigation - This section contains a listing of additional references on the topic(s) presented within the guide. Most of the references cited came from recent journal publications or contemporary textbooks.

Example Documents - This section provides example or sample forms, instruments and communiques that could be helpful in developing new ones to fit individual needs. These documents were developed, or adapted, and used during the field testing of the instructor guides.

Description of Each Guide

Guide 1: Introduction to the Identification and Assessment System

This guide presents an overview of the three-phase special needs identification and assessment system. A graphic portrayal of the system and a description of each of the system's major phases and component parts are provided. Suggestions on how to use the instructor guides are also contained within Guide 1.

Guide 2: Procedures for Identifying Students with Special Needs

Guide 2 examines the process of identifying and referring the student who is having a difficult time adjusting to the instructional program. Steps for determining the local education agency's procedures for student identification and referral are suggested and guidelines for developing such procedures are presented.

Guide 3: Strategies for Assessing the Student's Present Level(s) of Performance

This guide presents four different strategies which can be used in conducting a comprehensive assessment of the learner's level of vocational-educational performance at the time of entry into the vocational education program. This present level of performance information serves as the foundation for customizing the learner's instructional program. Also included within Guide 3 are suggestions on: 1) the personnel to be involved in collecting learner performance information, 2) the kinds of information to be collected, 3) the timeline for collecting learner performance data, and 4) how this information can be compiled for reporting purposes.

Guide 4: Preparing the Individualized Vocational Plan

Guide 4 introduces procedures for developing an individualized plan of action for the student with special needs. This individualized vocational plan identifies learner performance level(s) and pinpoints areas where additional instruction and special support services are needed. Each of the major components of the individualized plan is discussed, with examples provided to illustrate how the plan is to be prepared. Persons familiar with Individualized Education Program (IEP) development will find the procedures offered in Guide 4 to be compatible.

Guide 5: The Use of the Training Plan in Concurrent Work-Education Programs

This guide is specifically designed for instructors or teacher-coordinators who either have or will have responsibility for coordinating the learner's instruction in the school and at a training station in the community. The purpose of Guide 5 is to illustrate how the training plan can supplement the individualized vocational plan developed for the learner and also to serve as a tool for recording student progress throughout the school year.

Guide 6: Assessing Vocational Skill Development

Guide 6 offers suggestions for assessing the student's level of competence in completing an employment-related task or tasks. Strategies for assessing student performance during the task and/or following the completion of a task are discussed with examples provided.

Guide 7: Monitoring the Student's Individualized Vocational Plan

This guide provides the instructor with a means for collecting and recording student progress on a continuous basis. Through systematic monitoring of learner achievement, the instructor has a procedure for observing changes in student performance and a method for determining if modifications in the learner's individualized vocational plan are necessary. A sample document for recording student progress and suggestions for reporting this information are offered in Guide 7.

Guide 8: Conducting Student Follow-up

Procedures for planning and conducting a follow-up of special needs learners who have completed the vocational program and who are now engaged in work and/or continued training are presented in Guide 8. The information collected from learner follow-up should provide the instructor with a reading on the student's level of adjustment in the world of work and also offer some clues as to areas within the instructional program which may need to be strengthened.

Guide 9: Conducting Employer Follow-up

Guide 9 suggests several procedures for organizing and implementing an employer follow-up. By collecting employer feedback on former student job performance and feedback from the former student, both the vocational instructor and the support services personnel have a strong basis for determining future student and program needs.

2

PROCEDURES FOR IDENTIFYING STUDENTS WITH SPECIAL NEEDS

Bureau of Educational Research
University of Illinois
at Urbana-Champaign

2

INSTRUCTOR'S GUIDE

PROCEDURES FOR IDENTIFYING STUDENTS WITH SPECIAL NEEDS

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The report presented herein was prepared pursuant to Grant No. OEG007604835 from the Bureau of Occupational and Adult Education, U.S. Office of Education, Department of Health, Education and Welfare. The opinions expressed herein, however, do not necessarily reflect the position or policy of the U.S. Office of Education and no official endorsement should be inferred.

DO NOT STAPLE

INTRODUCTION

Some students may be able to succeed in a vocational education program with relative ease. Many may need a mixture of extra instruction and encouragement from the instructor if they are to "make it." A few students, however, may have physical, emotional, social or learning difficulties which limit their opportunities for program success. For these few, the instructor may find it necessary to alert other professionals (e.g., counselor, administrator) to these difficulties in order to determine the special assistance needed to ensure student achievement. The purpose of this guide is to assist the vocational instructor in determining the process used within her or his school for initiating and verifying the need of the student for special supportive services. This process is commonly referred to as student identification and referral.

GUIDELINES AND CONSIDERATIONS

The following considerations offer several procedures and suggestions to enable you to become familiar with the student identification and referral process in your school, or, if necessary, to design one for your vocational program.

1. Review existing identification criteria, procedures and forms used for referring the special student in your district. This first step should serve to avoid any unnecessary duplication of effort. If, however, you find the district does not have an established identification-referral process, the example documents in this guide may be helpful to both you and your school district.

2. Example Document #1 provides a completed version of an instrument used by an instructor to determine the student identification-referral procedures within her district. A blank copy of this instrument can be found in Example Document #2. You may want to use this tool while doing your search. Perhaps the best place to start this activity is by contacting your immediate supervisor.

3. Example Document #3 provides a completed version of an identification-referral form for the student with special needs. In some cases, parents or agencies from outside the school system (e.g., Juvenile Court, Department of Social Services) may know of a student with special needs and recommend to school officials that a referral be initiated. In most instances, however, instructors or other school personnel (e.g., counselor, principal, student) will initiate the referral. A blank copy of the identification-referral form can be found in Example Document #4.

4. Once the student identification-referral form is completed, it must be submitted to the appropriate person for action. This person could be the special needs resource manager, the counselor, the building administrator or the director of special education, depending on your local school organization. Whoever this person is, she or he must have the responsibility and authority for seeing that the referral is acted upon.

5. The person responsible for acting on your student referral form will likely contact you for further information about the student's performance. Procedures for obtaining and recording student performance data are offered in Guide 3.

6. Since the state department requires certain identification information from the district in order to reimburse the district for serving students with special needs, your administrator may ask you to identify the number of handicapped and disadvantaged students presently enrolled in your program. Therefore, you may want to consider the identification criteria specified by the Department of Vocational Education in your state as well. It is quite common for a state to adopt the definitions and criteria established at the federal level. Example Document #5 presents the federal criteria for the identification of handicapped and disadvantaged students enrolled in programs receiving vocational education funds. Even though most states have adopted the federal guidelines, it would be wise to check your state department's criteria, just in case a discrepancy does exist between federal and state identification requirements.

7. If you are unfamiliar with the federal categories and definitions of handicapping conditions, such as learning disabilities or health impaired, Example Document #6 provides a further explanation of each.

FOR FURTHER INVESTIGATION

For additional information on the topic of identifying special needs learners in vocational education see:

Albright, Len and Phelps, L. Allen. Teaching Special Needs Students: A New Challenge. Industrial Education, October, 1977. Pages 26-31.

Boldrey, Tom. Joliet Identifies by Computer. School Shop, April, 1978. Pages 72-73.

Brolin, Donn. Vocational Preparation of Retarded Citizens. Columbus, Ohio: Charles E. Merrill Publishing Co., 1976. (See Chapter 13 for sample identification-referral forms.)

Phelps, L. Allen and Lutz, Ronald J. Career Exploration and Preparation for the Special Needs Learner. Boston: Allyn and Bacon, Inc., 1977. (See Chapter 6.)

Phelps, L. Allen and Wentling, Tim L. A Proposed System for the Identification, Assessment and Evaluation of Special Needs Learners. Journal of Industrial Teacher Education, Spring, 1977. Pages 19-35.

EXAMPLE DOCUMENT #1

District Procedures for Identifying
Students with Special Needs
in Vocational Education

Date: 9/25/77

The purpose of this instrument is to record the procedures used for identifying students with special needs being considered for, or enrolled in, vocational education programs within your school. The following instructions should be reviewed before using this instrument:

1. The student identified as having "special needs" by the instructor is usually classified in one of two categories by the school system, handicapped or disadvantaged. The procedures for identifying and referring handicapped students in your district may be different than those used for disadvantaged learners. Therefore, separate reference is given to each group on this instrument.

2. Although the handicapped and disadvantaged are presented separately on this instrument, the items to consider under each category are the same. A description of each category is listed below:

   a. "Criteria" refers to the standards by which students with special needs are identified in vocational education. For instance, the criteria used within your school may be based on the federal and/or state criteria or they may differ. In each case specify what the criteria are.

   b. "Referral Procedures" simply means <u>how</u> referrals are to be made and to <u>whom</u>.

   c. "Eligibility Process" refers to the method(s) used to determine the extent to which the reported student's handicap or disadvantage interferes with successful participation in vocational education. For example, formalized testing may be used in determining the eligibility of the student with special needs. In this case, you would want to indicate what test(s) is (are) being used, who receives information on the results of this testing and the type of information offered.

   d. "Contact Personnel" is the person or persons responsible for determining the eligibility of the referred student for special services and for passing this information on to instructors.

Identification of Handicapped Students

The following information applies to:

X all vocational programs

_____ some vocational programs (specify which)_____

_____

_____

Criteria - Based on state criteria and similar to the federal classification scheme in Example Documents # 5.

Referral Procedures - 1) Parents, administrator, teacher or student submits a written referral form to the counselor. 2) Parents are notified of referral and must give permission for further evaluation. 3) Evaluation occurs. 4) A staffing conference with parents and student is held.

Eligibility Process - Classroom observations; parent, student and instructor interviews; background and record review; physical examination and psychological assessments when appropriate.

Contact Personnel - Psychologist in conjunction with building counselor and special education administrator along with parental consent.

Identification of Disadvantaged Students

The following information applies to:

X all vocational programs

_____ some vocational programs (specify which)_____

_____

_____

Criteria - Student must have an academic and/or economic disadvantage, as defined by state criteria, which in our case is the same as the federal requirements.

Referral Procedures - Parents, instructor, social worker, administrator, a student can make a referral on an informal basis (e.g. telephone call, conference with the counselor) but most are made through formal written referral to the vocational counselor.

Eligibility Process - Classroom observations; interview with student, parents and instructor(s); parent application for free lunch program; review student performance during past three years, particularly in the math and reading areas.

Contact Personnel - Vocational Education Director and Counselor

What sources were used to obtain the information requested on this form?

Handicapped: Special Education Director and Building Principal

Disadvantaged: Vocational Counselor

EXAMPLE DOCUMENT #2

District Procedures for Identifying
Students with Special Needs
in Vocational Education

Date: _____

The purpose of this instrument is to record the procedures used for identifying students with special needs being considered for, or enrolled in, vocational education programs within your school. The following instructions should be reviewed before using this instrument:

1. The student identified as having "special needs" by the instructor is usually classified in one of two categories by the school system, handicapped or disadvantaged. The procedures for identifying and referring handicapped students in your district may be different than those used for disadvantaged learners. Therefore, separate reference is given to each group on this instrument.

2. Although the handicapped and disadvantaged are presented separately on this instrument, the items to consider under each category are the same. A description of each category is listed below:

   a. "Criteria" refers to the standards by which students with special needs are identified in vocational education. For instance, the criteria used within your school may be based on the federal and/or state criteria or they may differ. In each case specify what the criteria are.

   b. "Referral Procedures" simply means <u>how</u> referrals are to be made and to <u>whom</u>.

   c. "Eligibility Process" refers to the method(s) used to determine the extent to which the reported student's handicap or disadvantage interferes with successful participation in vocational education. For example, formalized testing may be used in determining the eligibility of the student with special needs. In this case, you would want to indicate what test(s) is (are) being used, who receives information on the results of this testing and the type of information offered.

   d. "Contact Personnel" is the person or persons responsible for determining the eligibility of the referred student for special services and for passing this information on to instructors.

Identification of Handicapped Students

The following information applies to:

_____ all vocational programs

_____ some vocational programs (specify which)_____

_____

_____

Criteria -

Referral Procedures -

Eligibility Process -

Contact Personnel -

Identification of Disadvantaged Students

The following information applies to:

_____ all vocational programs

_____ some vocational programs (specify which)_____

_____

_____

Criteria -

Referral Procedures -

Eligibility Process -

Contact Personnel -

What sources were used to obtain the information requested on this form?

Handicapped:

Disadvantaged:

EXAMPLE DOCUMENT #3

Student Referral Form
Vocational Education

Student's Name: Mike Philips Grade: 11 Date: 9/19/77
School: West High

Person Initiating the Referral: Fred Davis
Title: Instructor - Building Trades

Please Specify the Reason for this Referral: Although Mike does well on performance activities in the lab and appears very interested in the building trades field, he has experienced difficulty in reading the course text. Also, Mike does come from a broken home and lives with his mother. He has often talked about the need for getting a job to help pay the family bills.

Special Services Presently Received: None that I am aware of.

Received By: J. Zack Title: Counselor Date: 9/20/77

Action Taken: Met with Mike and Mr. Davis individually. A staffing with Mr. Davis, the special needs program coordinator, the remedial reading teacher and the special education resource teacher will be held on 9/30/77 to examine the reading problem in greater detail and also to determine if special work/study funds are a possibility for Mike to help ease the family financial picture.

EXAMPLE DOCUMENT #4

Student Referral Form
Vocational Education

Student's Name:_____ Grade:_____Date:_____

School:_____

Person Initiating the Referral:_____

Title:_____

Please Specify the Reason for this Referral:_____

_____

_____

_____

_____

_____

_____

_____

_____

Special Services Presently Received:_____

_____

Received By:_____Title:_____Date:_____

Action Taken:

EXAMPLE DOCUMENT #5

Federal Guidelines for Identifying Disadvantaged and Handicapped Persons in Vocational Education Programs

Identification of a Disadvantaged Person

Definition - Persons (other than handicapped persons) who have academic or economic disadvantages, including persons who have limited English-speaking ability, and who require special services, assistance or programs in order to enable them to succeed in vocational education programs (Final Rules and Regulations for the Vocational Education Amendments of 1976, Section 104.804, Federal Register, October 3, 1977).

Criteria - Academic disadvantage means that a person: 1) lacks reading and writing skills; 2) lacks mathematical skills; or 3) performs below grade level.

Economic disadvantage means: 1) family income is at or below national poverty level; 2) participant or parent(s) or guardian of the participant is unemployed; 3) participant or parent of participant is receiving public assistance; or 4) the participant is institutionalized or under State guardianship (Section 104.804, October 3, 1977).

The State shall use, to the maximum extent possible, the funds expended for disadvantaged and persons of limited English-speaking ability to enable these persons to participate in regular vocational education programs (Section 104.313, October 3, 1977).

Identification of a Handicapped Person

Definition - The term handicapped--means persons who are mentally retarded, hard of hearing, deaf, speech impaired, visually handicapped, seriously emotionally disturbed, orthopedically impaired, or other health impaired, or persons with specific learning disabilities who by reason thereof require special education and related services, and who because of their handicapping condition, cannot succeed in the regular vocational education program without special education assistance or who require a modified vocational education program (Definitions, Appendix A, Federal Register, October 3, 1977).

Criteria - The (vocational education) program provided each handicapped child will be planned and coordinated in conformity with and as a part of the child's individualized educational program as required by the Education of the Handicapped Act (Section 104.182 (f), Federal Register, October 3, 1977).[1]

---

[1]The individualized education program (IEP) is a written statement, developed by a team of persons, indicating the specific program plans for each handicapped student. This plan is to be completed on at least an annual basis. The procedures suggested throughout these documents are based on the individualized planning concept and are in accord with the mandated requirements of PL 94-142, The Education for All Handicapped Children Act of 1975. The only difference is that the concept presented herein has been expanded to include both handicapped and disadvantaged persons in vocational education programs.

EXAMPLE DOCUMENT #6

Definitions of Handicapping Conditions According to Federal Statutes in Vocational and Special Education[1]

1. Deaf - means a hearing impairment which is so severe that the child is impaired in processing linguistic information through hearing, with or without amplification, which adversely affects educational performance.

2. Hard of hearing - means a hearing impairment, whether permanent or fluctuating, which adversely affects a child's educational performance but which is not included under the definition of "deaf" in this section.

3. Mentally retarded - means significantly subaverage general intellectual functioning existing concurrently with deficits in adaptive behavior and manifested during the developmental period, which adversely affects a child's educational performance.

4. Orthopedically impaired - means a severe orthopedic impairment which adversely affects a child's educational performance. The term includes impairments caused by congenital anomaly (e.g., clubfoot, absence of some member, etc.), impairments caused by disease (e.g., poliomyelitis, bone tuberculosis, etc.), and impairments from other causes (e.g., cerebral palsy, amputations, and fractures or burns which cause contractures).

5. Other health impaired - means limited strength, vitality or alertness, due to chronic or acute health problems such as a heart condition, tuberculosis, rheumatic fever, nephritis, asthma, sickle cell anemia, hemophilia, epilepsy, lead poisoning, leukemia, or diabetes, which adversely affects a child's educational performance.

6. Seriously emotionally disturbed - is defined as follows:

   (i) The term means a condition exhibiting one or more of the following characteristics over a long period of time and to a marked degree, which adversely affects educational performance:

---

[1] Taken from Final Rules and Regulations for PL 94-142, The Education for All Handicapped Children Act, Section 121a.5, Federal Register, August 23, 1977.

(A) An inability to learn which cannot be explained by intellectual, sensory, or health factors;
(B) An inability to build or maintain satisfactory interpersonal relationships with peers and teachers;
(C) Inappropriate types of behavior or feelings under normal circumstances;
(D) A general pervasive mood of unhappiness or depression; or
(E) A tendency to develop physical symptoms or fears associated with personal or school problems.

(ii) The term includes children who are schizophrenic or autistic. The term does not include children who are socially maladjusted, unless it is determined that they are seriously emotionally disturbed.

7. Specific learning disability - means a disorder in one or more of the basic psychological processes involved in understanding or in using language, spoken or written, which may manifest itself in an imperfect ability to listen, think, speak, read, write, spell, or to do mathematical calculations. The term includes such conditions as perceptual handicaps, brain injury, minimal brain disfunction, dyslexia, and developmental aphasia. The term does not include children who have learning problems which are primarily the result of visual, hearing, or motor handicaps, of mental retardation, or of environmental, cultural, or economic disadvantage.

8. Speech impaired - means a communication disorder, such as stuttering, impaired articulation, a language impairment, or a voice impairment, which adversely affects a child's educational performance.

9. Visually handicapped - means a visual impairment which, even with correction, adversely affects a child's educational performance. The term includes both partially seeing and blind children.

3

STRATEGIES FOR ASSESSING THE STUDENT'S PRESENT LEVEL(S) OF PERFORMANCE

Bureau of Educational Research
University of Illinois
at Urbana-Champaign

3

INSTRUCTOR'S GUIDE

STRATEGIES FOR ASSESSING THE STUDENT'S PRESENT LEVEL(S) OF PERFORMANCE

Len Albright

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The report presented herein was prepared pursuant to Grant No. OEG007604835 from the Bureau of Occupational and Adult Education, U.S. Office of Education, Department of Health, Education and Welfare. The opinions expressed herein, however, do not necessarily reflect the position or policy of the U.S. Office of Education and no official endorsement should be inferred.

INTRODUCTION

While there may be instances when the vocational instructor will identify and refer the student in need of special help (Guide 2), in many cases the student with special needs will have been referred and classified as having a handicap or a disadvantage long before enrollment in a vocational course. In both situations, however, a comprehensive assessment of the learner's current levels of vocational-educational performance is needed, in order to: 1) verify the extent to which the student's suspected or known handicap/disadvantage interferes with successful participation in the vocational education course and 2) develop an individualized vocational plan (Guide 4) for this student. Since the student is enrolled or will be enrolled in a vocational course, the course instructor should be involved in this assessment-planning process.

The purpose of this guide is to suggest and examine several different strategies for assessing the student's present levels of vocational-educational performance.

GUIDELINES AND CONSIDERATIONS

Before a comprehensive assessment of student performance is conducted, the following decisions will need to be made:

- Who is responsible for collecting information on the student with special needs enrolled in vocational education?
- What kinds of information will be required to get a comprehensive and up-to-date reading on student performance?
- When is the information to be collected?
- How is this information going to be collected?
- How will this information be reported when the learner's individualized plan is developed?

Let's examine each question in greater detail.

I. Who is responsible for collecting information on the student with special needs enrolled in vocational education?

Since the purpose of collecting data on current performance level(s) is to determine the instructional and special assistance needs of the special student, the student's instructor(s) should play a key role in this process. If, for example, a student with a particular handicap is being considered for, or enrolled in a regular vocational course, the special and vocational education instructors should be working together to determine student needs. Or, if a student with a known disadvantage is enrolled in a regular or modified vocational course, the vocational instructor and the appropriate resource person or persons (e.g., remedial reading instructor, counselor, placement specialist) should be in close communication regarding learner needs and progress. The instructor(s) and the resource person(s), along with the help of an administrator and a guidance person, could begin this process by determining the adequacy of existing student performance information. If additional assessments are deemed necessary, this team can decide how and when these assessments are to take place and by whom.

One of the most common practices for determining the persons responsible for collecting student performance information is by means of a staffing conference. Once the student has been referred and reviewed by the appropriate person (e.g., vocational counselor), this person may call a meeting, a staffing conference, with the student's instructors, the specialist(s) concerned with the referred problem and, when appropriate, the parents and student. The goals of this staffing are: 1) to discuss the student's referred problem, 2) review existing student performance information, 3) determine whether further assessments are needed, and if so, 4) identify the strategies for collecting this information.

II. What kinds of information will be required to get a comprehensive and current picture of the student's performance?

Since the basic purpose of the assessment information is to make judgments about the student's needs in a vocational education program, information on the learner's performance in the areas of personal, social, academic and vocational skill development should be considered. Performance information can be classified according to the recency of the information: information that describes how the student is presently functioning (current information) and information that describes how the student performed in the past (background information). A review of a student's cumulative could be an example of collecting background information, while collecting data on the student as he/she is performing in a laboratory situation is an example of obtaining current information.

The advantages of collecting current information include: (Salvia & Ysseldyke, 1978)

- Describes present behavior and characteristics in pertinent settings (i.e., historical information may offer little or no information on vocational performance).

- The person doing the assessment can select the information to be collected.
- The information can be verified.

However, current information by itself cannot provide a comprehensive picture of the student's present performance, because it does not yield information about prior events affecting this functioning. For instance, a student may be unable to read the instructions during a performance test. This may be due to a present condition (e.g., stress, poorly written instructions, lack of interest), or a reading problem may be suspected. If a reading difficulty is suspected, then a check of the student's cumulative file or a discussion with the student's previous instructor may substantiate this suspicion and also indicate what has been done to correct this deficiency.

While background information may be helpful in planning the learner's program, the reviewer of this information should be aware of the following limitations: (Salvia & Ysseldyke, 1978, p. 8)

- The reviewer cannot control what information was collected in the past; crucial bits of information may not be reported.
- Past information is difficult and sometimes impossible to verify.
- The conditions under which the information was collected are often difficult to evaluate.
- Remembered observations may not be as reliable as current observations.

III. When is the information to be collected?

It was suggested earlier that present level assessments could occur at two points: prior to the student's actual participation in the vocational course and/or during the first two to three weeks of student participation. With the federal mandate that an individualized education program (IEP) is to be developed on an annual basis for each school aged handicapped person (ages 3-21), many local educational agencies will likely conduct present level of performance assessments at both time periods. To illustrate, X school district has decided that the major development of each handicapped learner's IEP will occur at two periods during the year: Spring and Fall. During May the persons responsible for developing a student's IEP will meet to review the learner's progress, recommend program placement, develop learner goals and special services to be delivered during the upcoming year. When school begins in September, the learner's instructor(s) will have the primary responsibility for translating these goals into specific objectives and for specifying the type and duration of special services needed. If the student is to move into, or remain in a vocational course, the vocational instructor and the other members responsible for developing the student's IEP will be working closely to determine the assessment strategies most appropriate for the student at each major point in the development of the IEP.

IV. How is this information going to be collected?

Four strategies for obtaining information on the student's present competence level are suggested here:

A) By reviewing the student's cumulative record.

B) Through interviews with key personnel, such as previous teachers, parents, counselor and the student being considered.

C) By entry level performance sampling based on the general knowledge and skills of the respective vocational program.

D) By direct observation of student performance.

While each alternative will be treated separately in this section, in practice a combination of strategies should be used in order to gain greater insight into learner needs.

A. Review of the Student's Cumulative Record

Of the four methods suggested in this section, the file review is probably the most efficient means for obtaining information on the student's performance. Student records are usually easy to access since the information is commonly located in a central place and can usually be reviewed in one sitting. While the information contained in the student's file will vary among educational districts, two categories of information are typically collected:

Category 1

Category 1 data includes basic identifying data the school needs to operate the educational program, such as:

- Student's and parent's names and address
- Student's age
- Student's educational progress (grades completed, attendance and achievement evaluations)

Category 2

Test results and other verified information useful to the school for planning the student's educational program are classified in Category 2. Items such as the following are within this category:

- Hearing and vision screening reports
- Medical history
- Results from standardized academic achievement, psychological, aptitude and interest tests
- Systematic observations and counselor ratings
- Competence charts provided by previous teacher(s)
- Family background information (e.g., marital status, number of children in family, occupation(s))

In terms of obtaining information for educational planning, data on the student's health may reveal a particular medical disability and, therefore, should be reviewed carefully. One must, however, be cautious in her/his interpretation of standardized testing results. Some of the erroneous conclusions often drawn from such test scores include: (Smith & Neisworth, 1975, pp. 126-127)

- The misconception that achievement tests measure all, or even the most prominent skills in a subject area.
- The common belief that scores on standardized tests are infallible and provide reliable samples of a student's performance.
- The tendency to misinterpret differences in profiled scores as representing significant weaknesses or strengths in performance, when in fact they may represent normal errors in the achievement measures or variations in performance.
- The false assumption that if one has administered a battery of achievement tests one has a total picture of the prominent educational characteristics of a student.

If recent standardized achievement test results are chosen as one means for determining the student's competence level, and one or more subject areas (e.g., math, reading) appear to warrant special attention, a more detailed analysis of performance in those areas should be undertaken.

For an in-depth discussion on the advantages and disadvantages of standardized, commercial vocational testing measures, such as aptitude tests (e.g., Bennett Hand Tool Dexterity Test, Nonreading Aptitude Test Battery), interest tests (e.g., Geist Picture Interest Vocabulary, Reading-Free Vocational Interest Inventory) and work evaluation systems (e.g., TOWER, JEVS Work Samples, Singer Evaluation System) see Vocational Preparation of Retarded Citizens by Donn E. Brolin, 1976.

In summary, a review of the student's record may be especially helpful in detecting existing medical problems and in providing background information on a recently observed problem area. Standardized test data, however, may be too general to help in identifying the specific and current educational needs of the learner. When reviewing the student's file answers to the following questions should be sought:

A) What specific abilities, interests and strengths of the student are noted?

B) What appears to be the most significant problem(s) likely to affect the student's performance in a vocational setting?

C) What has been done in the past to correct these problems and what have been the results?

D) What specific needs of the learner can be dealt with by the vocational instructor and which may require special assistance?

Example Document #1 can be used for recording the key information obtained from the record review. *It is strongly recommended that local school district policy on the confidentiality of student records be determined before completing this form.*

B. Interviewing Key Personnel

A second option for gaining further insight into the student's educational performance is to interview persons most familiar with the student's interests and competence. This may include the student, the parents, the counselor and the student's most recent instructor(s). Although interviewing key persons may require more time than a review of the student's record, the potential for obtaining up-to-date, useful and specific planning information is much greater.

If the combination of records review and interviewing is used, the interview offers an opportunity to clarify and verify the data found in the student's file. For example, data in the file may indicate that the student is participating or was a participant in a pre-vocational course. However, the only item reported in the file is the student's grade. By following this lead in an instructor, student and/or parent interview, information concerning the specific skills taught and the degree to which the student mastered these skills could be located.

One technique for structuring an interview is through the use of an interview guide. Example Document #2 provides a completed interview guide for a student with a severe hearing impairment who finished the first year drafting course and was selected for an architectural-technical drafting course. This guide was used by the arch-tech drafting instructor to interview the student's previous drafting instructor and the deaf education instructor. Example Document #3 offers instructions for developing and using the interview guide along with a blank copy of the guide.

The interview guide in Example Document #3 sets the stage for a highly structured interview and is related directly to specific areas within a vocational course. If a less structured and more general approach is preferred, the following questions could serve this purpose: (Brolin, 1976)

- What has been the nature of the student's educational programming? In special and/or regular class orientation of the program, what have school personnel indicated about the student's performance?
- What has been the learner's adjustment to school in terms of personal interests, behavior and interpersonal relationships?
- What subjects does the student like and/or do well in; which ones does he/she do poorly in and/or dislike?
- What instructional techniques appear to be effective with this student? What kind of reinforcement does she/he respond to?

- Is the student in need of remedial academics? If so, what kind and under what conditions? Should this remedial work be separate from, or in concert with, vocational programming?

C. Entry Level Performance Sampling

Entry level performance sampling is an informal testing strategy used for assessing the student's general knowledge and skill in a given vocational course. While similar to the more commonly known forms of vocational performance testing such as work sample evaluation, work simulation and tool/material/equipment identification tests, entry level performance sampling is basically a general pre-test for vocational instruction. As such, it is to be used following student admission into the vocational program, but prior to actual vocational classroom/laboratory instruction. Its purpose is two-fold: 1) to obtain a direct reading of the student's performance in relation to a particular course area, and 2) to provide an indication of specific areas where special assistance may be needed.

An example of an entry level performance sample used in a building trades program is presented in Example Document #5a-c. In developing and administering this sample the building trades instructor completed the following steps:

- *Identified common knowledge and skills within the vocational course.*

  After reviewing the course objectives, the instructor concluded that there were some tools, materials and equipment used throughout the course (e.g., crosscut saw, hammer, level, wood, nails). In designing the sample, the instructor decided that an assessment of the actual use of tools and materials (direct performance assessment) would provide a truer picture of the student's competence than would a written or verbal test over the use of these items (indirect performance assessment). Through direct observation of the student constructing a sample, the instructor was able to judge the extent to which the student 1) followed directions, 2) used tools and materials, 3) stayed with the task, and 4) constructed the product.

- *Provided instructions to the test administrator or observer.*

  A written instruction sheet was developed which included: 1) who should administer the sample, 2) material, equipment and tools needed, and 3) items needed and factors to be considered in administering the sample (Example Document #5a).

- *Provided instructions to the student.*

  Written instructions to the student provided her/him with the rationale for completing the sample, the objective of the sample, the material/equipment and tools needed, and a detailed

listing of procedures to follow to complete the task, along with drawings of each major step (Example Document #5b).

- *Developed a Student Performance Rating Form.*

  A rating form for assessing the student's performance was also provided (Example Document #5c). Suggestions for using this instrument were stated in the instructions to the administrator (Example Document #5a).

- *Pilot tested and revised the sample.*

  This sample was administered to one student and revised several times following this try-out. The instructor plans to continue using this sample and, therefore, it is likely to undergo further revision.

A second example of an entry level performance sample for a beginning typing course is provided in Example Document #6. This pre-test was developed and is being pilot tested by a reading specialist and a typing instructor. The intent of the sample is to determine the strengths and weaknesses of students in basic language skills which apparently affect performance in beginning typing.

While the entry level performance sample may have several attractive features, such as: 1) offering an alternative to traditional forms of pencil and paper testing, 2) having high face validity to both student and instructor, and 3) providing an opportunity for direct and immediate feedback to the student, the following disadvantages need to be noted:

- o Requires a great deal of time to develop and administer.
- o Only a limited sample of performance is measured.

D. Direct Observation of Student Performance

Observation of the student in the normal classroom and laboratory setting can provide highly accurate, detailed and verified information not only about the student being assessed, but also about the setting in which the observations are being made.

Salvia and Ysseldyke (1978) suggest that there are two types of observations: systematic and nonsystematic. In nonsystematic observations the observer simply watches the learner in a given setting and takes notes of the behaviors, characteristics, and personal interactions that appear significant. Nonsystematic observations tend to be written subjective accounts of random, but potentially important, situations. In systematic observations the behavior(s) to be observed is (are) determined prior to the actual event. When in the setting, the observer typically counts or measures the frequency, duration or magnitude of the prespecified behavior(s). A shortcoming of systematic observation,

however, is that by focusing in on prespecified behavior, the observer may miss or ignore other important behaviors taking place at the same time. Example Document #7 provides a systematic observation form for recording student and peer behavior in the class/lab over one minute time intervals.

Both types of observation, but especially systematic observation, require an observer trained in this area. If the vocational instructor does not have this training and would like to use direct observation measures, she or he is advised to check with the special education department and/or the guidance office for additional assistance.

While collecting systematic and nonsystematic observational data may be time-consuming and the presence of an outside observer in the room may disrupt the normal setting initially, the results of observing, defining and recording behavior could be worth the extra effort, as suggested in the following quote:

> Most of us have speech disfluencies, but our hesitations do not mark us as stutterers; most of us withdraw into daydreams, but we are not considered schizophrenics and put into institutions; and most of us make errors but we are not considered retarded. GENERALLY, IT IS NOT WHAT WE DO THAT IS A PROBLEM FOR OURSELVES OR OTHERS, IT IS HOW OFTEN OR HOW MUCH OF THE TIME WE DO IT. (Reese, Ellen P. and Johnson, Kent R. Observing, Defining and Recording Behavior: A First Step Toward Accountability. Part 1: Preworkshop Training Program, December, 1976, p. 2.)

V. How will this information be reported when the learner's individualized plan is developed?

The persons responsible for collecting information on the identified learner must, first of all, keep the purpose of their efforts in mind: to obtain current and specific information which is to serve as the foundation for making decisions concerning the instruction and special services to be provided for the student. Therefore, the information reported should indicate both learner strengths and learner weaknesses.

Persons collecting student information (henceforth called the assessment-planning team) will want to examine the sample format for developing the student's individualized vocational plan in Guide 4 as an example for reporting the student's present level of performance. In this example, a comprehensive statement of present level performance is to be provided. This statement must provide enough information so that goals, objectives and special services can be determined.

The assessment-planning team has at least two ways to develop the present level of performance statement: (Higgins, 1977)

1. Each member of the assessment team can prepare a summary of findings along with recommendations for action. An

illustration of a reporting format for this purpose is located in Example Document #8.

2. A common worksheet can be developed that includes the required areas of performance related to the student's program. Each member could collect her or his assessment information independently and then meet as a team to summarize the major findings. One means of summarizing and graphically displaying this information is by using a profile of learner performance or a developmental checklist. A completed sample learner analysis profile is shown in Example Document #9. Instructions for completing this form can be found in Example Document #10.

Once this information has been collected, reviewed and summarized for reporting purposes, the next step is to develop the learner's individualized vocational plan (Guide 4).

FOR FURTHER INFORMATION

For additional information on strategies for assessing the student's present level of performance see:

Benjamin, Alfred. The Helping Interview. 2nd edition. Boston, Mass.: Houghton Mifflin Company, 1974.

Boyd, Joseph L. Jr. and Shimberg, Benjamin. Handbook of Performance Testing: A Practical Guide for Test Makers. Princeton, N.J.: Educational Testing Service, January, 1971.

Brolin, Donn E. Vocational Preparation of Retarded Citizens. Columbus, Ohio: Charles E. Merrill Publishing Co., 1976.

Deno, Stanley L. and Mirkin, Phyllis K. Data-Based Program Modification: A Manual. Reston, Va.: Council for Exceptional Children, 1977.

Erickson, Richard C. and Wentling, Tim L. Measuring Student Growth: Techniques and Procedures in Occupational Education. Boston, Mass.: Allyn and Bacon, Inc., 1976.

Foster, June C. et al. Guidance, Counseling and Support Services for High School Students with Physical Disabilities. Cambridge, Mass.: Technical Education Research Centers, Inc., 1977.

Gorden, Raymond L. Interviewing: Strategies, Techniques and Tactics. Homewood, Illinois: Dorsey Press, 1975.

Gronlund, Norman E. Constructing Achievement Tests. 2nd edition. Englewood Cliffs, N.J.: Prentice-Hall, Inc., 1977.

Higgins, Joseph P. Present Level(s) of Performance and Assessment: Some Basic Considerations. Chapter 2 in Torres, Scottie (ed.), A Primer on Individualized Education Programs for Handicapped Children. Reston, Va.: Foundation for Exceptional Children, 1977, pp. 9-13.

Phelps, L. Allen and Lutz, Ronald J. Career Exploration and Preparation for the Special Needs Learner. Boston, Mass.: Allyn and Bacon, Inc., 1977.

Salvia, John and Ysseldyke, James E. Assessment in Special and Remedial Education. Boston, Mass.: Houghton Mifflin Company, 1978.

Smith, Robert M. and Neisworth, John T. The Exceptional Child: A Functional Approach. New York, N.Y.: McGraw-Hill Book Company, 1975.

White, Owen R. and Liberty, Kathleen A. Assessment and Precise Educational Measurement. Chapter 2 in Haring, Norris G. and Schiefelbusch, Richard L., Teaching Special Children. New York, N.Y.: McGraw-Hill Book Company, 1976.

EXAMPLE DOCUMENT #1

Summary Report on Student's Cumulative Record

Student _____ Vocational Program _____

Date of Review _____

I. Category A Information

Student Address:

Parent Names and Address:

Educational Progress Data:

II. Category B Information

Medical Data:

Results:

Impressions:

Achievement/Aptitude/Interest Test Data:

Results:

Impressions:

Other:

EXAMPLE DOCUMENT #2

CAREER COMPETENCE INTERVIEW GUIDE

Student's Name Chris Baird

Vocational Program Arch-Technical Drafting

Date May 23, 1977

Instructor Anthony Barber

Person(s) Interviewed (Name and Title)

Bruce Macklin - Drafting Instructor

Ann Brown - Deaf Ed Instructor

Areas of Competence

Levels of Competence	Equipment Usage A) Machine B) Instruments	Lettering A) Mechanical B) Free-hand	Geometric Construction	Sketching and Shape Construction	Metric Measurement A) Accurate use of scale B) Conversion	Sketching and Shading
has had instruction related to	Yes - 1st year drafting course	Yes	Yes	Yes	Yes	Yes
has had work experience related to		No, but possible for immediate placement experience				
has demonstrated knowledge of concepts	Yes	Yes, an area of interest	Yes	Yes	Yes	Yes
has performed within competence area	Yes		Yes	Yes	Accuracy ok but relax to increase speed in making conversions	Yes

Areas of Competence

Levels of Competence

	Multiview Projection A) Normal Surfaces B) Inclined Surfaces C) Curved Surfaces	Reproduction of Drawings A) Blueprints B) Plazo Process	Sectional Views A) Full Section B) Half Section	Auxiliary Views A) Height B) Depth C) Width	Dimensioning
has had instruction related to	yes	yes	yes		yes
has had work experience related to					
has demonstrated knowledge of concepts	yes		yes		
has performed within competence area	yes, but needs more practice in developing visualization		yes		needs more practice on location of dimensions

Areas of Competence

Levels of Competence

	Threads and Fasteners	Working Drawings	Pictorial Representation A) Oblique B) Isometric C) One point perspective D) Two point perspective	Architecture Basic Plans	Career Opportunities in Field A) Draftsmen B) Architects C) Engineers D) Design E) Contractors
has had instruction related to	Yes		A & B only		Yes, but only through discussions and class readings
has had work experience related to					Should have direct exposure & involvement in at least 3 of the above careers during the coming year
has demonstrated knowledge of concepts	Yes		A & B		
has performed within competence area	Yes	needs to improve on dimensioning techniques	A & B	Carrie enjoyed this section. Has good design ability. needs help on layout.	

-15-

Additional Information

Student's Previous Work Experience

Job Title(s)	Location(s)	Employer(s)	Date(s)
None, but Chris did complete the 1st year drafting course.			

General Comments on Student's Level of Competence

① Is neat and has good linework, has a good working relationship with fellow students, follows directions well.

② Drafting instructor has indicated Chris needs to increase speed in completing work needs to build confidence in performing basic skills and in the visualization process to keep from wasting time on repeating activity over & over on the same problem.

③ Drafting & Deaf Ed. instructors noted that written instruction seems to prevent any breakdown that usually occurs with verbal communication.

④ Even though Chris works well with others, a few students have had a difficult time understanding Chris's language. Since two of these students are now enrolled in arch-tech drafting we may need to help them in understanding Chris's language.

EXAMPLE DOCUMENT #3

Instructions for Developing and Using the Career Competence Interview Guide

This interview guide is to be used by the vocational instructor when interviewing persons most familiar with the student's school and work performance (e.g., parents, former instructor, student). Its purpose is to obtain an initial reading of the student's strengths and weaknesses in relation to particular areas within the vocational course curriculum. This instrument should be most helpful for planning the learner's program when used prior to the student's actual participation in the course. It could be used shortly after the course begins, but, at this time, direct assessment strategies (e.g., entry level performance sampling, systematic observation) can be used and will likely provide as much or more specific planning information.

The following steps are suggested for developing and using the Career Competence Interview Guide:

Identifying Competence Areas

1. When the student is known to have had prior training and/or work experience in the course content area, detailed information on the student's level of competence may be sought. If this is the case, then the instructor could identify and list the major course content areas, or unit topics, on the guide, as was done in Example Document #2.

2. If, however, the student is known to have had little or no prior training and/or experience in the course content area, or, if the course is, for example, a general work experience program, then a listing of basic job entry competencies (e.g., job application, interview, following directions, employer-employee relations) may be more applicable.

3. Or, depending on the course content and the student's prior experience and/or training, the instructor may select a mixture of basic entry and specific occupational competence areas (combination of 1 and 2 above).

Constructing the Survey

1. Once the competence areas are identified, the next step is to list them on the competence guide. Place each competence area in the space located at the top of the guide, underneath the title "Areas of Competence."

2. In the example interview guide, the person being interviewed may provide information on student competence at one or more levels. Four levels are listed on the left hand column of the guide and are defined as follows:

A. The student has had instruction related to the particular competence area. This level indicates the person may know the student has had formal instruction in this area, but he or she may or may not be aware of related work experience and the degree of student knowledge and performance in this area.

B. The student has had work experience related to the particular area. The person reporting may know the student has had related work experience and may or may not be able to tell you the student's level of knowledge and performance in each competence area.

C. The student has demonstrated knowledge of concepts related to a given competence area. In this case, the person being interviewed can provide information on the degree to which the student has demonstrated an understanding of the technical or cognitive knowledge associated with the competence area. For instance, the person reporting may indicate the student is able to pronounce and spell the major terms on an application form (cognitive knowledge). However, the student's performance in filling out an application form may or may not be known.

D. The student has performed within the competence area simply means the person reporting is able to indicate the student's performance level in a particular competence area.

3. Once the competence areas are identified and listed, several copies of the instrument should be reproduced. It is recommended that the instructor use one copy per interview and one copy be given to each person interviewed for personal reference.

Using the Interview Guide

1. During the interview, each competence area is to be discussed. The instructor will want to record comments in the appropriate blocks, making more detailed notes of particular areas of student strength and weakness.

2. Example Document #4 offers additional suggestions for organizing and conducting the interview and for compiling the results of the interviews.

CAREER COMPETENCE INTERVIEW GUIDE

Student's Name _____ *Vocational Program* _____

Date _____ *Instructor* _____

Person(s) Interviewed (Name and Title)

_____

_____

Areas of Competence

Levels of Competence

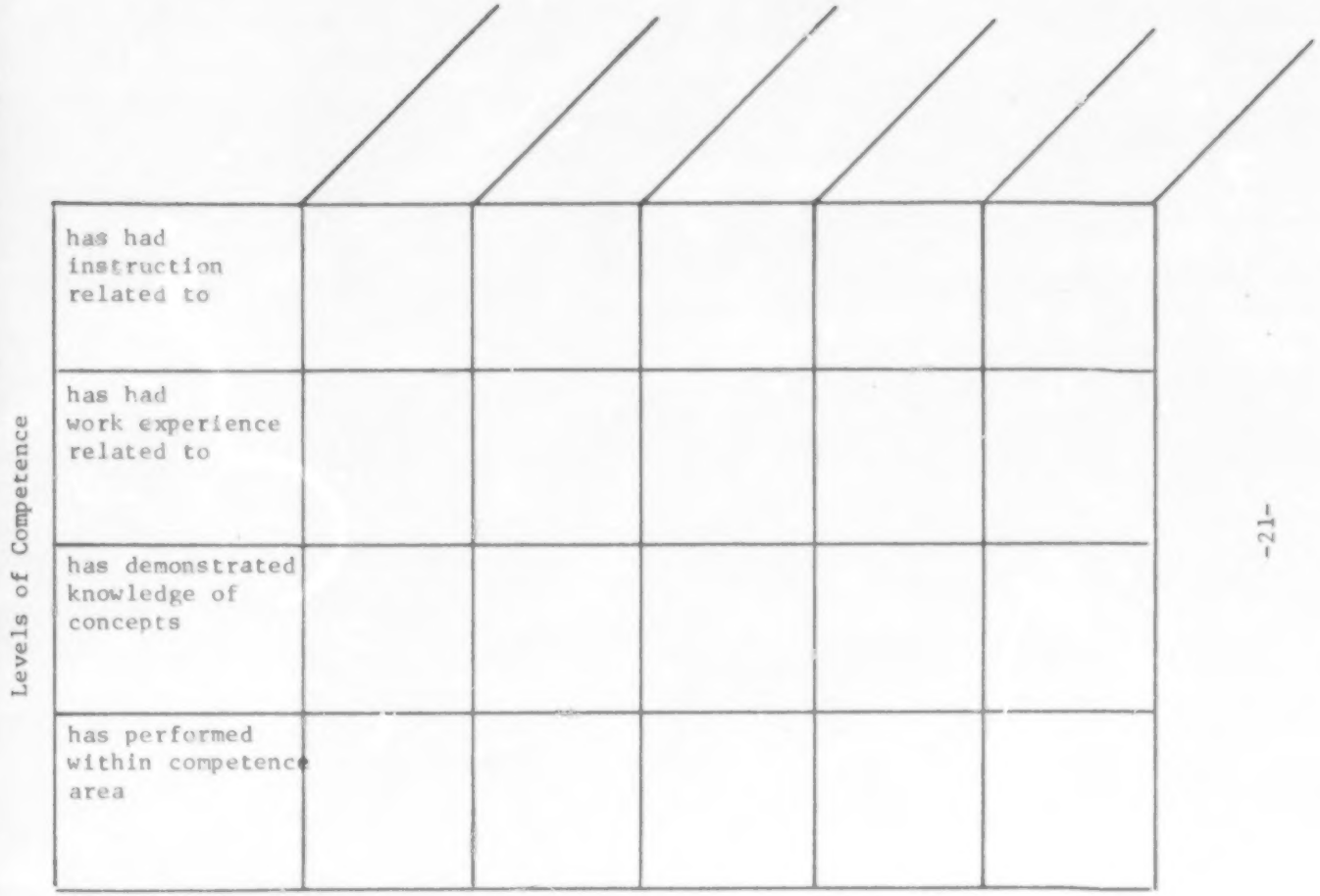
has had instruction related to						
has had work experience related to						
has demonstrated knowledge of concepts						
has performed within competence area						

Areas of Competence

Levels of Competence

has had instruction related to					
has had work experience related to					
has demonstrated knowledge of concepts					
has performed within competence area					

Areas of Competence


Levels of Competence
has had instruction related to
has had work experience related to
has demonstrated knowledge of concepts
has performed within competence area

Additional Information

Student's Previous Work Experience

Job Title(s)	Location(s)	Employer(s)	Date(s)

General Comments on Student's Level of Competence

EXAMPLE DOCUMENT #4

Suggested Procedure for Interviewing Key Personnel

Prior to the Interviews

- Determine key persons to be interviewed.
- Determine content and format for an interview guide.
- Construct interview guide, or list general questions to be addressed during the interview.
- Contact key personnel to explain purpose of the interview and to arrange a convenient meeting time and place.

During Each Interview

- Restate the purpose of the meeting.
- Provide a copy of guide or key questions to the person(s) being interviewed. Explain how the interview will proceed.
- If unsure about a person's response, ask for clarification or for additional information.
- Be observant of non-verbal as well as verbal responses.
- Close meeting by sharing how this information will be used.

After the Interviews

- Compare responses of persons interviewed.
- Look for common areas of concern, but also be sensitive to individual responses.
- Determine areas of student strength and weakness.

EXAMPLE DOCUMENT #5a

Instructions for Administering

the Building Trades Performance Sample*

The performance sample should be administered by the Building Trades instructor, an Industrial Education teacher or someone trained and/or experienced in the building trades area. For increasing the reliability of observations, it is recommended that more than one person observe and record student performance.

Material Needed:

1 piece of 1" x 4" at least 8' long

24 6d nails

Damp or wet sand in container - approximately 18" in diameter

Instruction sheet

Equipment and Tools Needed:

Crosscut saw

Hammer

Level

Tape measure

Framing square

Pencil

Safety glasses

Items needed by individual administering performance test:

Evaluation form

Timing device

Pencil or pen

*Adopted from sample used in the Building Trades program, Vermilion Occupational Technical Education Center, Danville, Illinois. This sample was developed by the building trades instructor and the vocational director at this vocational center.

Before starting the student on the performance sample, the administrator should review with the student(s) the material and equipment needed. Also, the administrator should inform the student that she or he may ask questions at any point during this exercise. If a student has difficulty reading the instruction sheet, the individual administering the test should explain the instructions in detail. Likewise, if a student cannot read the drawings, an actual sample should be furnished. The student is now ready to begin the performance test.

The administrator is to observe the student during the performance, while recording on the checklist provided (Example Document #5c). In addition to the items noted on the checklist, the individual administering the test may find it helpful to record the type and frequency of questions asked by the individual(s) taking the test. This could indicate some area of difficulty in the test conditions. After the completion of the performance test, the student's finished product should be checked for accuracy by the individual administering the test.

EXAMPLE DOCUMENT #5b

INSTRUCTIONS FOR STUDENT COMPLETING THE BUILDING TRADES PERFORMANCE SAMPLE*

Rationale: As a student recently enrolled in the Building Trades program, you are to read the following directions and complete each step as directed. This test will give you an opportunity to demonstrate the skills you already possess, as well as identify the areas you may need help in while enrolled in Building Trades. The skills used in completing this performance test relate to a great majority of the tasks you will be involved in while completing your Building Trades program.

THIS TEST IS BEING GIVEN TO YOU TO HELP PLAN YOUR PROGRAM TO BE OF MAXIMUM BENEFIT TO YOU - IT IS NOT USED FOR SCREENING STUDENTS FROM THE PROGRAM!

Material Needed:

1 piece of 1" x 4" at least 8' long

24 6d nails

Damp or wet sand in container at least 18" in diameter

Equipment Needed:

Crosscut saw

Hammer

Level

Tape measure

Framing square

Pencil

Safety glasses

*Adopted from sample developed and used in the Building Trades program, Vermilion Occupational Technical Education Center, Danville, Illinois.

Objective of this Activity:

Upon completion of this activity, you will have demonstrated the following skills:

Sawing - cut squarely to within 1/8" accuracy

Measuring - to within 1/8" accuracy

Squaring - to within 1/8" over 12 inches

Nailing - securely and without missing the nail

Leveling - to at least 1/8" of the bubble (1/8" accuracy on a 24" level over 12 inches)

Steps:

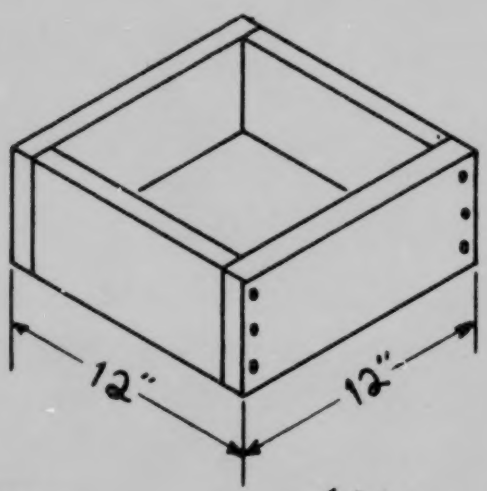
First, check to see if all needed material and equipment are available. Second, read each step carefully. Begin working on the performance sample, practicing safety during the entire activity.

Step 1. Review complete procedure sheet.

2. Cut 2 - 1" x 4" boards 12" in length.

3. Cut 2 - 1" x 4" boards to the correct length (12" less the thickness of 2 - 1 x 4).

4. Using 6d nails, assemble the 1 x 4 frame using 3 nails to each corner (drawing #1).

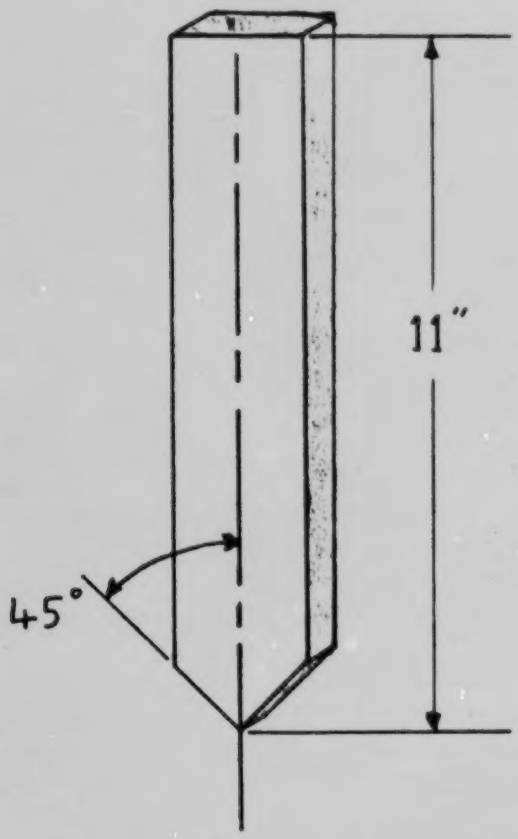


DRAWING #1

5. Check frame for squareness and measuring accuracy.

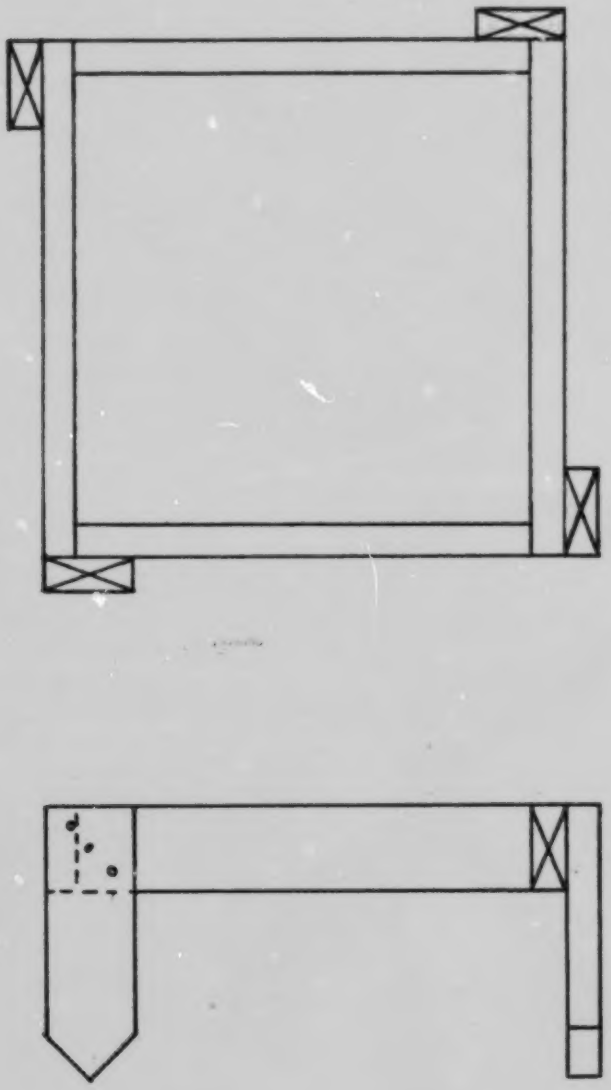
6. Cut 4 - 1" x 4" boards to correct length (11" long).

7. Cut points (45° from center line on one end of each stake (drawing #2).



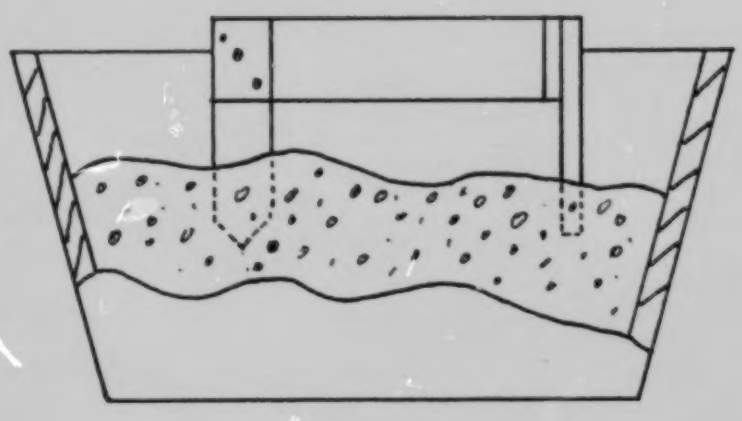
DRAWING #2

8. Nail stakes to each corner of the 1" x 4" frame using 3 6d nails in each stake (drawing #3).



DRAWING #3

9. Level the frame in the container of sand (drawing #4).



DRAWING #4

10. Clean up your work area.

11. Notify the test administrator that you have completed the activity and are ready to discuss your performance.

THANK YOU!

EXAMPLE DOCUMENT #5c

STUDENT PERFORMANCE EVALUATION FORM*

Student's Name:_____ Date:_____

Observer(s):_____

PROCESS ASSESSMENT

OBSERVED PERFORMANCES	YES	NO	COMMENTS
DID THE STUDENT:			
use the following tools properly:			
Tape Measure			
Hand Saw			
Hammer			
Square			
Level			
use the following tools with ease:			
Tape Measure			
Hand Saw			
Hammer			
Square			
Level			
DID THE STUDENT:			
stick to the task?			
appear to enjoy the task?			
need further instruction?			
at what point?			
how much time had elapsed?			
become frustrated with the task?			
at what point?			
how much time had elapsed?			

(USE THIS SPACE TO EXPLAIN ANY FRUSTRATION)

*Adopted from sample developed and used in the Building Trades program, Vermilion Occupational Technical Education Center, Danville, Illinois.

PROCESS ASSESSMENT

OBSERVED PERFORMANCES	YES	NO	COMMENTS
DID THE STUDENT:			
refer to the written instructions?			
how much?			
follow instructions well?			
oral			
written			
further explanations			
DID THE STUDENT:			
complete the task			
with sufficient ease?			
How much time elapsed from start to finish?			
Did the student appear confident during this activity?			
Did the student rush to finish and show a crude finished product?			

PRODUCT ASSESSMENT

MEASURABLE SKILLS	UNSATISFACTORY		SATISFACTORY		UNSATISFACTORY	COMMENTS
	1/4	1/8	0	1/8	1/4	
Measuring (1/8" tolerance)						
Cutting (1/8" tolerance)						
Squaring (1/4" tolerance)						
Leveling (1/8" tolerance on bubble)						

OVERALL COMMENTS AND RECOMMENDATIONS

STATEMENT OF PRESENT LEVEL PERFORMANCE

EXAMPLE DOCUMENT #6

TYPING-LANGUAGE SKILL SAMPLE

Introduction

The purpose of this sample is to determine the strengths of students in basic language skills which might affect performance in beginning typing. The test has been adapted from the Century 21 Typewriting textbook. It is also suitable for use with 20th Century Typewriting.

GRAMMAR

Directions to the student: Read each sentence. Pay close attention to the underlined part. Decide which sentence is correct, and write the letter of the correct sentence on the answer sheet.

1. a. One of the applicants are here to see you.
   b. One of the applicants is here to see you.

2. a. My mother and my father is away this week.
   b. My mother and my father are away this week.

3. a. Everyone in the class is typing well.
   b. Everyone in the class are typing well.

4. a. The jury has returned its verdict.
   b. The jury have returned its verdict.

5. a. All the food has been frozen.
   b. All the food have been frozen.

6. a. The cars don't work properly.
   b. The cars doesn't work properly.

7. a. Neither of the boys brought their lunch.
   b. Neither of the boys brought his lunch.

8. a. The winner of both events were from our school.
   b. The winner of both events was from our school.

9. a. Jane, who is a member of the class, has finished its work.
   b. Jane, who is a member of the class, has finished her work.

10. a. All of us have completed our project.
    b. All of us have completed his project.

*Permission received for use herein from Edwardsville School District, Illinois, and South-Western Publishing Company.

PUNCTUATION

Directions: Read each sentence. Decide which sentence is punctuated correctly. Write the letter of the correct sentence on the answer sheet.

11. a. If you can go we will go swimming.
    b. If you can go, we will go swimming.

12. a. We shall visit Chicago, St. Louis, and Dallas.
    b. We shall visit Chicago St. Louis and Dallas.

13. a. You know, Larry, that your paper is late.
    b. You know Larry that your paper is late.

14. a. Ellen was born on December 6, 1963.
    b. Ellen was born on December 6 1963.

15. a. She lives in Green Bay, Wisconsin.
    b. She lives in Green Bay Wisconsin.

16. a. He yelled, "Fire."
    b. He yelled, "Fire!"

17. a. When are you leaving for work.
    b. When are you leaving for work?

18. a. He named his three favorites: Dylan, Denver, and Collins.
    b. He named his three favorites Dylan, Denver, and Collins.

19. a. Mr. Jones is a door to door salesman.
    b. Mr. Jones is a door-to-door salesman.

20. a. Senator Percy Illinois went to the meeting.
    b. Senator Percy (Illinois) went to the meeting.

21. a. The book Jaws was written by Benchley.
    b. The book Jaws was written by Benchley.

22. a. She asked, When did the shipment arrive?
    b. She asked, "When did the shipment arrive?"

23. a. I read the article The Next Twenty Years.
    b. I read the article "The Next Twenty Years."

24. a. To criticize is easy, to help is not so easy.
    b. To criticize is easy; to help is not so easy.

25. a. Pay Mr. Smith's bill.
    b. Pay Mr. Smiths bill.

CAPITALIZATION

Directions: Read each sentence. Pay close attention to the underlined letters. Decide which sentence is capitalized correctly. Write the letter of the correct sentence on the answer sheet.

26. a. She said, "hard work is needed for success."
    b. She said, "Hard work is needed for success."

27. a. He will see President Carter on Friday.
    b. He will see president Carter on Friday.

28. a. We watched the canadians play hockey.
    b. We watched the Canadians play hockey.

29. a. We went on a picnic on Labor Day.
    b. We went on a picnic on labor day.

30. a. We went to church on Sunday.
    b. We went to church on sunday.

31. a. My father fought in World War II.
    b. My father fought in world war II.

32. a. Her favorite season is Spring.
    b. Her favorite season is spring.

33. a. The store is on Main street.
    b. The store is on Main Street.

34. a. The Boy Scouts had a meeting.
    b. The boy scouts had a meeting.

35. a. The assignment begins on Page 200.
    b. The assignment begins on page 200.

Spelling

Directions: Decide which one of the two words is spelled correctly. Write the letter of your answer on the answer sheet.

36. a. receive
    b. recieve

37. a. seperate
    b. separate

38. a. discribe
    b. describe

39. a. dinning
    b. dining

40. a. doesn't
    b. does'nt

41. a. February
    b. Febuary

42. a. comming
    b. coming

43. a. stoped
    b. stopped

44. a. disapear
    b. disappear

45. a. embarrass
    b. embarass

WORD DIVISION

Directions: Decide which one of the two words is divided correctly. Write the letter of your answer on the answer sheet.

46. a. fin-an-cial
    b. fi-nan-cial

47. a. stress-ing
    b. stres-sing

48. a. sum-mer
    b. summ-er

49. a. run-ning
    b. runn-ing

50. a. jump-ing
    b. jum-ping

PROBLEMS

Directions: Follow the instructions for each problem. Write the letter of your answer on the answer sheet. DO NOT WRITE ON THIS TEST.

51. The center of your paper is at 50 on your typewriter. To find the left margin, you subtract 1/2 of your typing line from the center point of your paper. Where do you set your left margin for a 60-space typing line?

    a. 10 b. 20 c. 25 d. 30

52. There are 66 vertical typing lines on a full sheet of typing paper. To find the top margin, subtract the total number of typing lines needed for the problem from 66. Next, divide that number by 2. Finally, add 1, and that answer will be the number of lines needed for your top margin. If you need 30 lines for your typing problem, how many lines will you have in your top margin?

    a. 14 b. 16 c. 18 d. 19

PROOFREADING

Directions: Read sentence. Decide if it is right or wrong. If the sentence is completely right, mark TRUE on the answer sheet. If the sentence has any mistakes in it, mark FALSE on the answer sheet.

53. My carr needs new tires.

54. The cost of living is rising.

55. You can paint teh house next week.

56. How do you know what todo with the mixer?

57. John wants to save his money for a motorcycle.

58. Mary is a net dresser.

59. Business letters should be neatly typed.

60. Next month I shall be gin my new job.

NAME:_____ TEST___

LANGUAGE SKILL TEST
ANSWER SHEET

GRAMMAR

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

PUNCTUATION

11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____
25. _____

CAPITALIZATION

26. _____
27. _____
28. _____
29. _____
30. _____
31. _____
32. _____
33. _____
34. _____
35. _____

SPELLING

36. _____
37. _____
38. _____
39. _____
40. _____
41. _____
42. _____
43. _____
44. _____
45. _____

WORD DIVISION

46. _____
47. _____
48. _____
49. _____
50. _____

PROBLEMS

51. _____
52. _____

PROOFREADING

53. _____
54. _____
55. _____
56. _____
57. _____
58. _____
59. _____
60. _____

Grammar	/10
Punctuation	/15
Capitalization	/10
Spelling	/10
Word Division	/5
Problems	/2
Proofreading	/8

EXAMPLE DOCUMENT #7

BEHAVIOR OBSERVATION RECORD*

Recorder_____ Student_____

Date_____ Circumstance (activity observed)_____

Length of time observed_____

CATEGORIES	TARGET STUDENT	TOTAL
Noise		
Out of place		
Off task		
Physical contact		
Other		

PEERS

Noise	
Out of place	
Off task	
Physical contact	
Other	

A form for recording observations of behavior in classroom. Each square represents one minute of observation.

*Taken from Deno, Stanley L. and Mirkin, Phyllis K., Data Based Program Modification: A Manual. Council for Exceptional Children, Reston, Va., 1977, pp. 101-103.

Definitions of Categories
Used in the Behavior Observation Record

1. Noise: Any sounds created by the learner which distract either another student or the teacher from the business at hand. The noise may be generated vocally (including "talk outs" or unintelligible sounds) or nonvocally ("tapping a pencil" or "snapping fingers").

2. Out of place: Any movement beyond the either explicitly or implicitly defined boundaries in which the student is allowed movement. If the student is seated at her or his desk, then movement of any sort out of the seat is "out of place."

3. Physical contact or destruction: Any contact with another person or another person's property which is unacceptable to that person. Kicking, hitting, pushing, tearing, breaking, taking, are categorized as physical contact or destruction.

4. Off task: Any movement off of a prescribed activity which does not fall into one of the three previously defined categories. "Looking around," "staring into space," "doodling," or any observable movement off of the task at hand is included.

5. Other: Although the behaviors defined above serve as a reasonable basis for most observations, individual cases may arise in which other behaviors should be recorded. Students may be identified who do not communicate or who do not interact. In such instances, either "self-initiated utterances" or "self-initiated contacts" may be added, defined, and recorded. Generally, however, the first four categories will encompass many of the discrete categories which might be considered, and the "other" category should only be used if absolutely necessary to clarify the "problem" identified by the teacher.

EXAMPLE DOCUMENT #8

Team Member Assessment Report

Student:_____ Area(s) Assessed:_____

Date:_____

Summary of Findings:

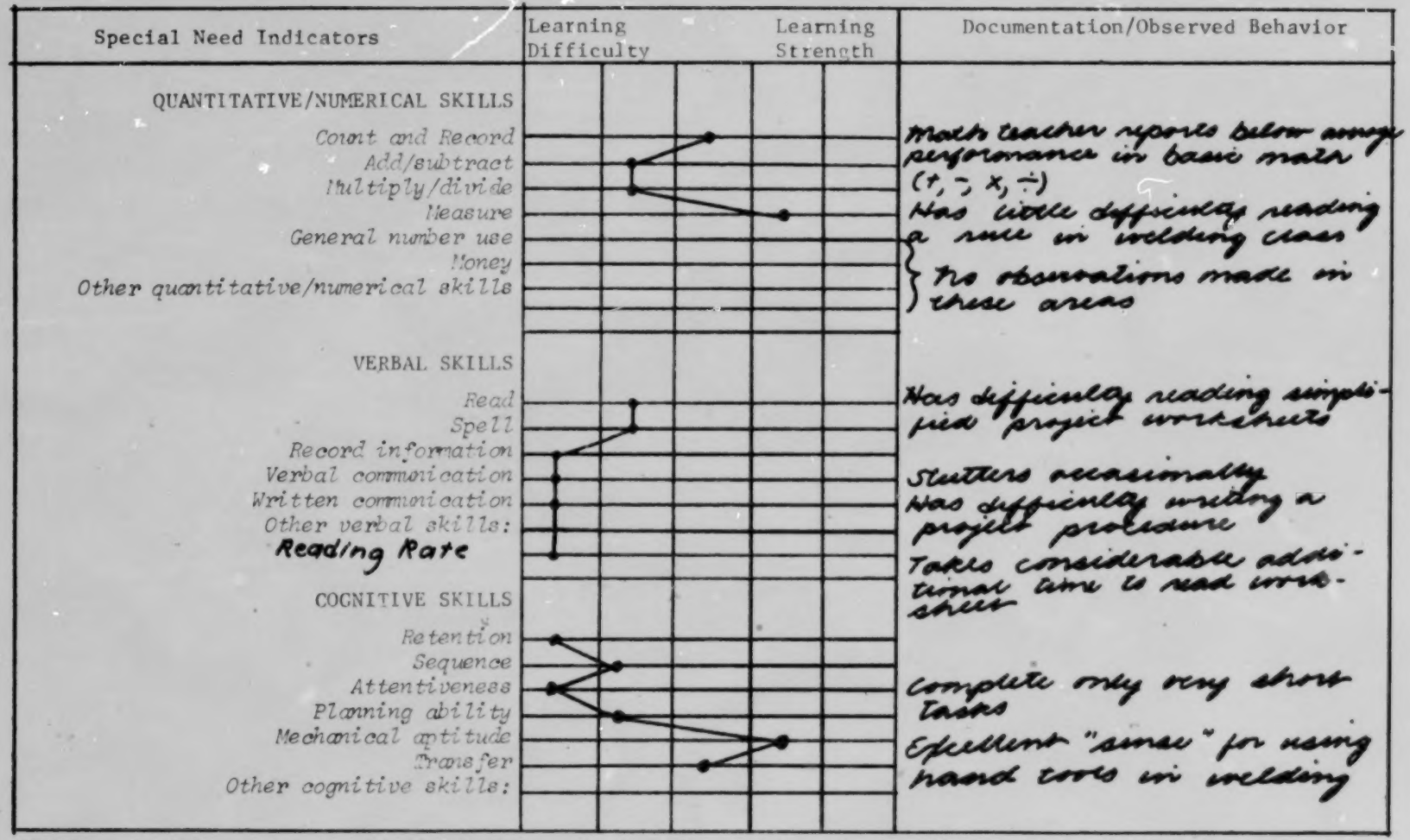
Recommendations for Action:

EXAMPLE DOCUMENT #9

Learner Profile*

Learner: Lloyd
School: Johnstown H.S.
Date: 9-15-78

Assessment/Appraisal Team:
Ms. Forbes, Welding
Ms. Jenkins Spec. Ed.



*Phelps, L. Allen and Lutz, Ronald J. Career Exploration and Preparation for the Special Needs Learner. Boston, Mass. Allyn and Bacon, Inc., pp. 116-118. Reprinted with permission from authors and publisher.

Special Need Indicators	Learning Difficulty / Learning Strength	Documentation/Observed Behavior
PERCEPTUAL SKILLS		
Auditory discrimination		often requests that directions be repeated
Form perception		
Form discrimination		
Space perception		
Color perception		Recognizes safety colors in the lab (shop) with no problem
Touch discrimination		
Other perceptual skills:		
LANGUAGE SKILLS		
Listening		
Nonverbal expression		
Technical vocabulary		
Grammatical expression		
Other language skills:		
PSYCHOMOTOR/PHYSICAL SKILLS		
Physical strength		Has difficulty holding on to small objects when involved in activities
Hand-eye coordination		
Manual dexterity		
Mobility		
Other physical skills:		
SOCIAL SKILLS		
Sociability		Popular with classmates
Cooperativeness		
Conformity		
Loyalty		
Safety		
Responsibility		
Sensitivity		
Other social skills: Hyperactive		Several teachers find it difficult to keep him on task

Special Need Indicators	Learning Difficulty	Learning Strength	Documentation/Observed Behavior
OCCUPATIONAL INTERESTS			
Agriculture/Natural Resources			always interested in working on his minibike
Automotive and Power Services			
Construction/Manufacturing			welding and machine tool classes requested
Graphics/Communications			
Food/Clothing/Child Care			
Health			
Office/Business			
Other or specific occupational interests: Welding			Has requested a work observation experience at a welding shop for next semester

EXAMPLE DOCUMENT #10

Directions for Completing the Learner Profile*

This profile is to be completed by the learner's assessment team following the collection of present level of performance information.

1. Special Need Indicators: Eight broad categories of special need are identified in the Learner Profile. These categories represent the major basic skill areas in which the observable effects of handicaps or disadvantages tend to occur. The general categories of special need indicators include:

   - Quantitative/Numerical Skills
   - Verbal Skills
   - Cognitive Skills
   - Perceptual Skills
   - Language Skills
   - Psychomotor/Physical Skills
   - Social Skills
   - Occupational Interests

   A general definition for each of these categories is provided on the following page. Within each of the major special need categories several specific basic skills are listed. There is also room provided for including additional basic skills that are not listed on the Learner Profile form.

2. Profile Ratings: For each of the special need indicators, the assessment/appraisal team is asked to make a determination as to whether or not this indicator identifies a strong or weak area in the student's school performance. Through discussion of documenting evidence and the noting of specific learner behaviors which the team has observed, a consensus rating for each special needs indicator is derived. This rating is made on a five-step rating scale which ranges from "learning difficulty" to "learning strength." Students who do not exhibit particular disabilities or strengths with regard to the "indicator" should be rated in the middle. When the rating is completed, the marks (checks or dots) can be connected to provide a profile of the student's learning style.

*Adapted from Phelps, L. A. and Lutz, R. J., Career Exploration and Preparation for the Special Needs Learner. Boston, Mass.: Allyn and Bacon, Inc., pp. 119-120. Reprinted with permission from authors and publisher.

SPECIAL NEED INDICATOR CATEGORIES

Special Need Indicator Categories	Definition
Quantitative/Numerical Skills	Involves the ability to count, record, perform basic arithmetic processes, measure and otherwise use or manipulate numerical information.
Verbal Skills	Involves the ability to communicate in written and spoken forms.
Cognitive Skills	Involves the ability to follow instructions, remember, sequence information, plan, organize, and make decisions.
Perceptual Skills	Involves the ability to accurately perceive colors, forms, space, sounds, and odors.
Language Skills	Involves the ability to listen, understand, and express oneself using written and oral forms of language.
Psychomotor/Physical Skills	Involves the ability to coordinate and perform physical movements.
Social Skills	Involves the ability to interact with others and act independently in an acceptable manner.
Occupational Interests	Identifies the learner's major cluster of occupational interest or preference.

4

PREPARING AN INDIVIDUALIZED VOCATIONAL PLAN

Bureau of Educational Research
University of Illinois
at Urbana-Champaign

4

INSTRUCTOR'S GUIDE

PREPARING AN INDIVIDUALIZED VOCATIONAL PLAN

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The report presented herein was prepared pursuant to Grant No. OEG007604835 from the Bureau of Occupational and Adult Education, U.S. Office of Education, Department of Health, Education and Welfare. The opinions expressed herein, however, do not necessarily reflect the position or policy of the U.S. Office of Education and no official endorsement should be inferred.

INTRODUCTION

Collecting data on the student's present level of performance (Guide 3) represents the first step in developing an individualized vocational plan for the special needs student. The second step, that of formulating the student's vocational plan based on current level of performance information, requires answers to the following questions:

1. What are the needs of the learner in relation to the goals and objectives of the vocational course?
2. What special strategies and/or resources appear to be necessary to ensure student success?
3. What criteria will be used to determine student success?
4. How will student success be measured?

Procedures for addressing these questions will be offered in this guide. The information presented herein should assist the assessment-planning team in preparing an individualized vocational plan for the student with special needs.

GUIDELINES AND CONSIDERATIONS

The Individualized Vocational Plan (IVP) is basically a written plan of action for the special student.* The plan itself consists of four major components:

- A statement of the student's present level(s) of performance.
- A description of annual goals and short-term objectives for the student.
- An identification of special services/assistance needed.
- A listing of the criteria to be used in, and a schedule for, evaluating student progress.

Each of the above components of the plan will be defined within this section, along with examples to illustrate how the plan is to be completed. Strategies for organizing planning efforts will precede this discussion.

A review of a sample format for preparing the student's IVP may be helpful before proceeding through the following information. This sample can be found in Example Document #1.

I. Steps in Organizing the Student's IVP

As suggested in Guide 3, the learner's IVP is to be developed by the assessment-planning team, which consists of the persons responsible for collecting information on the student's present level of performance. In addition to these persons, the parents and the student should be involved in IVP development. At a minimum, then, an IVP team should include: 1) the student's vocational instructor, 2) a local administrator responsible

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*As presented herein, the Individualized Vocational Plan (IVP) is for the student who: 1) is enrolled in a secondary or postsecondary vocational course and 2) has been identified as having a handicap or a disadvantage which appears to limit opportunities for successful performance in the vocational setting. Persons familiar with Public Law 94-142, which requires the development of an Individualized Education Program (IEP) for each handicapped learner, will find the procedures for IVP development to be in accord with the provisions of this federal mandate.

for supervising vocational and/or special education, 3) the parents, 4) the student, and 5) the person responsible for providing special educational services. This fifth person would be selected on the basis of student need(s). If, for example, a student is in need of special reading instruction, the remedial reading specialist may be appropriate. Or, if the student is in need of counseling services, the guidance counselor or the school psychologist may be considered.

To recap much of what has been said and to place instructor and team member roles within a planning framework, let's take a look at the steps involved in IVP development. Areas of personnel input will be suggested within each of the sequential planning steps in Figure 1.

Figure 1 -- IVP Development

IVP STEPS	PERSONNEL INPUT
1. Identify and Refer Student with Special Needs in Vocational Education (Guide 2).	1. Student in need of special help is referred to appropriate person (e.g., vocational counselor) by instructor, parents, student or other educational personnel. The person receiving the student referral initiates action to a) notify parents and student of the referral and b) organize the assessment-planning team for the purposes of determining student needs and developing an individualized vocational plan for the student.
2. Assess Present Level of Performance (Guide 3)	2. The assessment-planning team determines strategies for collecting information on the student's current performance level. Decisions are made as to the information needed and how it is to be collected. This information may be collected individually and reported during Step 3. Or, the team may decide to collect information on an individual basis and then meet collectively to prepare a team summary report of student needs before Step 3 occurs.
3. Prepare the Student's IVP (Guide 4)	3. The assessment-planning team, the parents of the student and the student meet to develop the Student's Individual Vocational Plan.

II. Contents of an IVP

As can be noted in Example Document #1, the student's IVP is to include statements on the learner's present level of performance, annual goals, short-term objectives, time-lines for measuring student progress, along with an indication of the amount and type of special services/assistance to be provided for the learner.

Let's now take a closer look at the major components of the IVP and see how each is to be developed:

A. *Annual Goals*

Information on the student's current performance level is to be condensed into a brief statement. This statement should include the major findings of the assessment-planning team (Guide 3). Figure 2 provides an illustration of how the assessment information could be described in an IVP.

Figure 2 -- Sample Present Level of Performance Statement

PRESENT LEVEL(S) OF PERFORMANCE:

Academic: Mike's reading at approximately the 9th grade level. While the reading level doesn't appear to be a major area for concern, his study habits seem to be. Sophomore English and History instructors stated that Mike appeared disinterested in both subjects, often came to class unprepared and frequently failed to complete assignments on time.

Personal-Social: Mike has been found to be very quiet in class. His previous teachers note that he seldom spoke during class and appeared reluctant to participate in small group classroom activities.

Prevocational/Vocational: Mike worked full-time at H. Morgan Seafood during the summer and plans to work there part-time on the weekends. His employer says Mike is a dependable and hard-working employee. Mike wants to work as a cabinet worker or as a carpenter for his industrial cooperative education (ICE) experience. But on his ICE math pretest (9/14/78), Mike was unable to read the ruler or work with fractions.

B. *Annual Goals*

The annual goals are statements which indicate where the student should be at the end of the school year. Each goal statement is developed by comparing the student's present level of performance in an area of concern with the desired level of performance. An example of how the learner's needs may be translated into a goal statements is provided in Figure 3. This example is based on Mike's present level of performance statement in Figure 2.

Figure 3 -- Sample Annual Goals Statement

ANNUAL GOAL(S):

By the end of the school year Mike will:

1. Demonstrate competence in spraying and wiping stain, spraying lacquer, stacking of wet parts, hanging doors, attaching hardware and assembling lazy susans.

2. Read a ruler and perform math operations at a level typically required in a cabinet shop.

3. Improve study habits and spend more time in preparation for class.

4. Increase reading comprehension.

The annual goals described in the learner's IVP do not, of course, represent an entire listing of the instructional goals for the school year. Rather, the goals listed in the IVP merely signify areas of special consideration; areas where special services are felt to be necessary in order to improve learner performance. The annual goals statement is to be related directly to learner needs, as identified in the present level of performance section of the IVP.

C. *Short-Term Objectives*

Once the annual goals are stated, the next step involves converting these goals into measurable short-term objectives. Or, to put it another way, the goals will need to be broken-down into related task statements. Short-term objectives may be defined as a series of performance-oriented task statements which represent the steps between the student's present level of performance and the desired level as stated in an annual goal.

In reference to Mike's plan, one of the goals was to read a ruler. An example short-term objective may be, "Following one week of instruction and practice, the learner will measure 10 objects to the nearest 1/16th of an inch."

If the reader is in the process of preparing a course curriculum for a vocational program and interested in obtaining lists of task statements, the following sources should be helpful:

- Contact the Department of Vocational Education in the state office.
- Ask for task statements from local vocational program advisory committee.
- Contact the National Center for Research in Vocational Education, The Ohio State University, Columbus, Ohio.
- Review procedure, service or process manuals prepared by local business and industry.
- Examine the Dictionary of Occupational Titles and/or the Occupational Outlook Handbook.

The goals of the vocational program will likely determine which of these sources is most helpful.

Let's now see how the short-term objectives are to be specified.

D. *Performance Criteria, Evaluation Procedures and Schedule*

Each short-term objective should include a standard or *criterion* which specifies the minimum level a student must achieve to master the objective. If, for example, a task is to improve student accuracy, the criterion may be stated as a percent, e.g., "measure 5 objects to the nearest 1/16th of an inch with 100% accuracy." When time is to be used as a criterion, then a statement such as, "complete a sales slip in 2 minutes" would be appropriate. Oftentimes, the aim is to have the student perform a chain of behaviors. Therefore, the criterion can be stated by the number of trials, e.g., "correctly record a telephone order five out of six trials."

In all of the above cases, the procedure for *evaluating* student performance is direct observation. This approach requires only that objectives are written in measurable terms and that either through a teacher-made test or by observation a student's performance is measured (Blankenship, 1977). If direct measurement is used then a statement to that effect should appear on the student's vocational plan.

A *schedule* for evaluating student progress is also to be identified on the student's plan. If direct performance measures are used, student progress should be assessed daily, or in at least a weekly or bi-weekly

basis. In doing so, the instructor can use these data to monitor student progress and adjust her/his teaching strategies to insure student success (Lilly, 1977). A format for recording student progress data will be offered in Guide #7 (Monitoring the Student's Individualized Vocational Plan). For purposes of the individualized plan, however, all that is needed is a statement indicating when student progress is to be measured (i.e., daily, weekly).

Figure 4 offers two examples of short-term objectives, with criteria, evaluation procedures and schedule for Mike, the Industrial Cooperative Education student. The sample plan format illustrated in Example Document #1 is used in these examples.

Figure 4 -- Sample Objectives, Criteria, Evaluation/Schedule

Short-Term Objectives	Criteria	Evaluation/Schedule
1. Increase the amount of time spent in preparation for class.	The student is to designate a regular study period in the evening and spend at least one hour per night studying.	The student will keep a log of time spent studying and subjects studied for a two week period. The parents will check Mike's documentation and verify its accuracy on a weekly basis.
2. Demonstrate competence in sanding cabinets with a belt sander and finish sander.	Criteria will be established by the employer using acceptable standards in the use of equipment/materials, quality of work completed and time requirements for finishing the task.	Vocational coordinator will work with employer in specifying the criteria and timelines for evaluation. Both coordinator and employer will observe student performance and evaluate according to specified criteria.

E. *Special Services/Assistance to be Provided*

This section is, perhaps, the most important element in the student's IVP. This is the portion of the plan which identifies the type of special services and/or assistance needed to help the student succeed in a vocational setting. These special supportive services may be in the form of staff help, material/media/equipment resources, and/or community service agency aid. For example, a mildly handicapped student enrolled in a regular vocational program may require special instruction from a special education teacher. This assistance may be within a special resource room, or the special educator could help the student within the regular classroom setting, or both strategies may be needed. Or, a disadvantaged learner may be deficient in math skills and could profit from remedial instruction by a specialist in this area. Perhaps, a special text or related materials may be all that is necessary. In Mike's case (Figures 2, 3 and 4), the I.C.E. coordinator worked closely with the parents on study skills, a math tutor and the coordinator worked on improving the math skills and special reading instruction was provided by a reading specialist.

If special services or devices (e.g., large print texts, equipment modifications, language interpreter) appear necessary for the student to complete a given course, or courses, the feasibility of their acquisition should be discussed with the appropriate authorized person or persons prior to the time when the IVP is developed (Hull, Parrish and Hill, 1977).

For some excellent suggestions on removing, modifying and coping with architectural barriers see Gollay and Doucette's article in School Shop, April 1978.

When considering special materials, an assessment of their appropriateness should be conducted prior to actual purchase, or if teacher prepared, prior to final revision. Example Document #2 offers a checklist for evaluating instructional materials.

III. Beyond Developing the Individualized Plan

The activities and information within Guides 3 and 4 lead to the actual development of an individualized plan for the special needs student. This plan is, of course, to be completed before the student enters the vocational program and/or within the first two to three weeks of the school year. This type of planning will be of limited value unless provisions are made for continued review and update. As the student progresses through the instructional program, modifications of the original plan are likely to be needed. The nature of these modifications will, in large part, be determined by student progress being made toward stated short-term objectives. Therefore, the vocational instructor will need to collect data on student progress and use these data to recommend, if and when necessary, any changes needed to be made in the students IVP. Procedures for monitoring student progress as well as suggestions for collecting progress data are presented in Guides #5, 6 and 7.

FOR FURTHER INVESTIGATION

For additional information on topics related to developing individualized plans for student with special needs in vocational programs see:

Albright, Len and Phelps, L. Allen. Teaching Special Needs Students: A New Challenge. Industrial Education, October, 1977, pp. 26-31.

Blankenship, Colleen. Illinois Interim Resource Manual for Preparing Individualized Education Programs. Springfield, Illinois: Specialized Educational Service Department, Illinois Office of Education, August, 1977.

Cegelka, Patricia T. and Phillips, Misha W. Individualized Education Programming at the Secondary Level. Teaching Exceptional Children, Spring, 1978, pp. 84-87.

Gollay, Elinor and Bensberg, Gerald J. Making Better Use of Support Services. School Shop, April, 1978, pp. 54-56.

Gollay, Elinor and Doucette, John F. How to Deal with Barriers in Schools. School Shop, April, 1978, pp. 86-89.

Hayes, Ruth. The What, Who, How, etc., of the IEP. School Shop, April, 1978, pp. 57, 60.

Hull, Marc E.; Parrish, Linda H. and Hill, Owen J. Individualized Education Programs. Industrial Education, December, 1977, pp. 26-30.

Kroth, Roger. Parents-Powerful and Necessary Allies. Teaching Exceptional Children, Spring, 1978, pp. 88-90.

Lilly, M. Stephen. Evaluating Individualized Education Programs. Chapter 5 in Torres, Scottie (ed.), A Primer on Individualized Education Programs for Handicapped Children. Reston, Va.: Foundation for Exceptional Children, 1977, pp. 26-30.

Phelps, L. Allen and Lutz, Ronald J. Career Exploration and Preparation for the Special Needs Learner. Boston, Mass.: Allyn and Bacon, Inc., 1977.

EXAMPLE DOCUMENT #1

INDIVIDUALIZED VOCATIONAL PLAN

Student's Name _____ Initial Team Planning Date _____

IVP Coordinator's Name_____ Date for Team Review/Revision _____

PRESENT LEVEL(S) OF PERFORMANCE

Academic:

Personal-Social:

Prevocational/Vocational:

SERVICES/ASSISTANCE TO BE PROVIDED FOR CURRENT YEAR

Type	Date Services Begin	Duration

ANNUAL GOALS

OBJECTIVES, CRITERIA, EVALUATION, AND SCHEDULE

Short-Term Objectives	Criteria	Evaluation/Schedule

IVP TEAM MEMBERS' SIGNATURES:

(Name) (Title)

EXAMPLE DOCUMENT #2

INSTRUCTIONAL MATERIALS CHECKLIST*

Directions: Commercially-produced or teacher-prepared materials can be evaluated using the review criteria listed below. Both occupational and special educators should assess the material prior to purchase or final revision (if teacher prepared).

Title: _____ Evaluators: _____

Media Type (film, book, etc.): _____

Source: _____ Date: _____

		Rating (Lo → Hi)			Inappropriate Criteria (check)
1.	Is the instructional material potentially interesting for the learner(s) for whom it is intended?	1	2	3	_____
2.	Are the skills/knowledges/attitudes it will develop appropriate for the learner?	1	2	3	_____
3.	Are the skills/knowledges/attitudes it will develop consistent with the instructional objectives of the unit?	1	2	3	_____
4.	Does the material contain explicitly stated goals so that students and teachers alike will be able to evaluate their performance?	1	2	3	_____
5.	To what extent is the material controlled to provide the appropriate reinforcement for correct responses and near correct responses?	1	2	3	_____
6.	To what extent can students actively participate with the instructional material?	1	2	3	_____
7.	To what extent are the materials useful with both individuals and groups?	1	2	3	_____
8.	Are the directions for using the material too complex for teachers and/or learners to readily understand?	1	2	3	_____

*Adapted from Phelps, L. Allen and Lutz, Ronald J. Career Exploration and Preparation for the Special Needs Learner. Boston, Mass.: Allyn and Bacon, Inc., 1977, pages 299-301. Adapted with permission from authors and publisher.

		Rating Lo		Hi	Inappropriate Criteria *(check)*
9.	To what extent is the material flexible enough to permit additions, deletions, or modification of content?	1	2	3	_____
10.	To what extent is the material portable and readily available from the distributor or manufacturer?	1	2	3	_____
11.	To what extent has the material been pre-tested, pilot tested, and evaluated with different special needs populations?	1	2	3	_____
12.	To what extent does the material permit the teacher to evaluate diagnostically a student's level of performance to determine where the learner should begin?	1	2	3	_____
13.	Will the material have to be adapted to another media form (e.g., braille, enlarged print, etc.) for visually handicapped learners?	1	2	3	_____
14.	Will the material have to be adapted to another media or format for orthopedically handicapped learners (e.g., self-instructional packages for homebound instruction)?	1	2	3	_____
15.	Will the material have to be adapted to another media (e.g., cassette/ audio tapes to print) for hearing impaired learners?	1	2	3	_____
16.	Is the material sufficiently durable for classroom or lab use?	1	2		_____
17.	Are sufficient and appropriate examples or applications used to realistically present the information?	1	2	3	_____
18.	Other considerations/criteria:				

19. DISPOSITION *(Check one)*:

_____ Do not purchase and/or use

_____ Purchase and/or use "as is"

_____ Purchase and/or use after modification

5

THE USE OF THE TRAINING PLAN IN CONCURRENT WORK-EDUCATION PROGRAMS

Bureau of Educational Research
University of Illinois
at Urbana-Champaign

5

INSTRUCTOR'S GUIDE

THE USE OF THE TRAINING PLAN IN CONCURRENT WORK-EDUCATION PROGRAMS

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INTRODUCTION

This guide is for the teacher-coordinator of a concurrent work-education program, i.e., the person responsible for coordinating the learner's instruction in the school and at a training station in the community. Its purpose is to illustrate how the *training plan*, the basic tool used for integrating the student's school instruction and on-the-job training, can be used to strengthen the learner's IVP and for organizing on-going assessments of student progress during the school year.

GUIDELINES AND CONSIDERATIONS

In Guide 4 it was suggested that the learner's IVP be developed prior to and/or during the first three weeks of vocational instruction. If, at the IVP preparation stage, the learner's job placement is in process, or is unknown, the teacher-coordinator may have a difficult time specifying learner goals, objectives and special services needed for the work phase of the program. Under either circumstance, the coordinator can establish goals, objectives and special service needs for the learner based on the common skills taught during related class instruction (e.g., job application and interview skills). But, statements of on-the-job skills which appear to require special assistance in school and/or at work site may lack precision.

While general statements concerning the learner's on-the-job training needs may be satisfactory at the time of IVP development, provision should be made for specifying student needs shortly after job placement has occurred. At this point (e.g., two weeks of job experience), the coordinator can use the training plan to work with the job

station supervisor and the student in determining specific areas of student need. A sample training plan format is presented in Example Document #1.

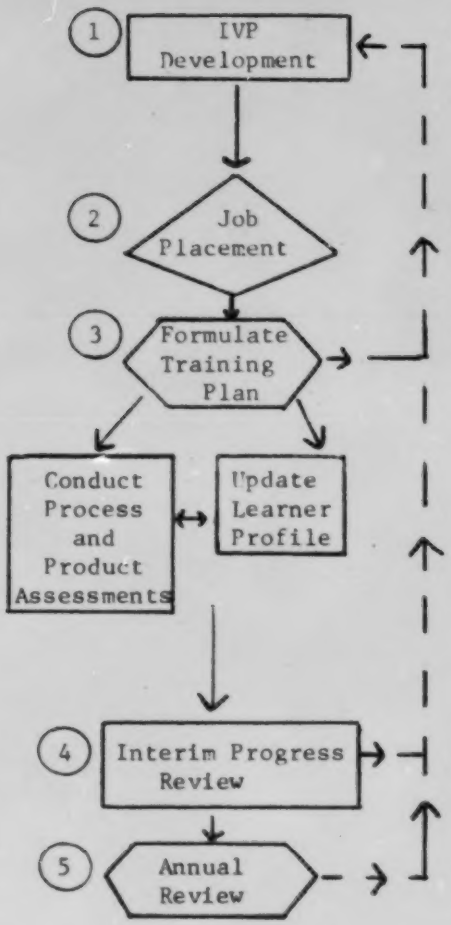
Figure 1 on page 3 presents a flow chart which illustrates the use of the training plan for up-dating the learner's IVP and as a means for checking student progress throughout the school year.

Procedures for implementing Step 1 (IVP Development) in Figure 1 were offered in Guides 3 and 4. Suggestions for completing a portion of Step 3 (Update Learner Profile), for Step 4 (Interim Progress Review) and for Step 5 (Annual Review) are offered in Guide 7. Steps 2 (Job Placement) and 3 (Formulate Training Plan) are, however, unique to the concurrent work-education program. Therefore, the rest of this guide will be concerned with these two steps.

Step 2, Job Placement, simply refers to the point at which the student is placed on the job. The training agreement is a standard feature in most work-education programs, and should be completed before the student begins work. This agreement describes, in general terms, the training commitment agreed upon by the employer, the school, the student and the parents. The training agreement is not a legal document. Rather, it serves as a mutual working agreement which, except for just cause, should be honored by all parties involved (Meyer, Crawford and Klaurens, 1975). This form should be signed by the persons involved and each should receive a copy of the agreement. A sample training agreement appears in Example Document #2.

Step 3, Formulate Training Plan, should occur two to three weeks after student placement. This period provides the student with time to

Figure 1 -- Assessing Student Progress in Concurrent Work-Education



Steps	Instrument(s) Initiated
1 IVP DEVELOPMENT • Student's present level of performance determined (Guide 3) • IVP developed by the assessment-planning team (Guide 4)	Individual Vocational Plan (IVP)
2 JOB PLACEMENT • Student, through assistance from the coordinator, begins job experience	Training Agreement
3 FORMULATE TRAINING PLAN • Approximately two weeks after placement, the coordinator, with assistance from employer & student, organizes the student's training plan. Areas needing special attention are noted. • Coordinator adds training plan information to IVP. • Coordinator & employer conduct process & product assessment (Guide 6). • Coordinator updates Learner's Task Proficiency Profile (Guide 7).	Student Training Plan Performance Checklists, Rating Scales Learner Task Proficiency Profile
4 INTERIM PROGRESS REVIEW • Team reviews progress of student (Guide 7) • Conducted at mid-year	IVP Training Plan Learner Task Proficiency Profile
5 ANNUAL REVIEW • Conducted near end of school year • Team reviews student gains & makes recommendations regarding future placement (Guide 7)	IVP Learner Task Proficiency Profile

"settle in" and allows ample time for employer and coordinator to observe the student's work performance. Once formulated, the training plan information, especially the area(s) in need of special services, should be added to the student's IVP. A sequence for organizing the training plan is listed below.*

A. The coordinator explains to the employer (or a job station supervisor) and the student-learner the purposes of a training plan and the procedures for developing one.

B. The coordinator, the job station supervisor and the student-learner develop a list of work activities that should contribute to the learner's occupational progress during the school year.

C. The coordinator, the job station supervisor and the student-learner list the types of knowledge and skills needed by the learner in performing the work activities referred to in B.

D. The coordinator, the job station supervisor and the learner cooperatively determine a plan for putting B and C into action.

E. Areas in need of special supportive services are indicated to the members of the assessment-planning team and considered for inclusion in the learner's IVP.

The training plan should specify skills to be taught both in school and on the job, with space provided for entering periodic ratings of student performance. Like the IVP, the learner's training plan is subject to change as she/he progresses through the program and additional areas of strength and weakness are identified. The coordinator and the job station supervisor will, undoubtedly, find it necessary to modify and/or expand the original plan. Two additional examples of training plan formats are presented in Example Documents #3 and 4.

*Adapted from Cooperative Occupational Education by Ralph E. Mason and Peter G. Haines, Interstate Printers, Danville, Illinois, 1972, p. 222.

In addition to periodical ratings made on the training plan, the coordinator and/or the job station supervisor will likely want to use other measures to determine student performance. Example Document #5 provides an illustration of a rating scale which could be used for assessing student performance. In this example, the scale is for an employer assessment of student performance at each grading period. Also, Guide 6 offers some hints and examples for rating student performance.

As the student demonstrates a given skill level, this information can be recorded on the Learner Task Proficiency Profile (Guide 7). Or, the coordinator may decide to indicate the level of skill attainment on the training plan. Either approach is acceptable as long as the format for communicating the student's level of skill development is readily understood by a variety of persons (i.e., IVP team, parents, future employers, agency personnel) and the content provides a comprehensive treatment of student performance in school and on the job.

FOR FURTHER INVESTIGATION

For additional information on the use of training plans in concurrent work-education see:

Elias, John E. and Niederkorn, Sheryl. Co-op Training Plans Do Work. In American Vocational Journal, May 1978, pp. 68-71.

Illinois State Board of Education, Department of Adult, Vocational and Technical Education. An Articulated Guide for Cooperative Occupational Education. Springfield, Illinois, no date. Bulletin No. 34-872.

_____. Handbook for Cooperative Vocational Education in Illinois. Springfield, Illinois, no date.

Mason, Ralph E. and Haines, Peter G. Cooperative Occupational Education and Work Experience in the Curriculum. Danville, Illinois: Interstate Publishers, 1972.

Meyer, Warren G.; Crawford, Lucy and Klaurens, Mary K. Coordination in Cooperative Vocational Education. Columbus, Ohio: Charles E. Merrill Publishers, 1974.

Stadt, Ronald W. and Gooch, Bill G. Cooperative Education: Vocational, Occupational, Career. Indianapolis, Indiana: Bobbs-Merrill Company, Inc., 1977.

EXAMPLE DOCUMENT #1

TRAINING PLAN

for

_____

(student name)

Job Title _____ Employer _____

Place of Employment _____

JOB TRAINING	Date(s) Observed	Performs with Supervision	Performs Independently	RELATED CLASSROOM INSTRUCTION	Date Started	Date Completed

JOB TRAINING	Date(s) Observed	Performs with Supervision	Performs Independently	RELATED CLASSROOM INSTRUCTION	Date Started	Date Completed

EXAMPLE DOCUMENT #2

_____ HIGH SCHOOL DISTRICT New Jersey

TRAINING AGREEMENT*

The Employer _____
Company Name Address

Agrees to Employ _____
Student-Learner Address

on a part-time basis for the purpose of training the student in the

_____ trade.

WAGES:

Starting wage will be $_____ per hour.

Students in this program will receive wages comparable to wages paid to other trainees performing the same type or class of work and wages that are in conformity with State and Federal minimum wage acts.

Students will work a minimum of 15 hours and a maximum of 20 hours for the five (5) day week, and may work up to eight (8) additional hours on Saturdays.

WORKING CONDITIONS:

All student-learners must be covered by Workman's Compensation Insurance.

The employer will observe all laws and regulations, both State and Federal, pertaining to the employment of minors.

Where a union or bargaining agency is involved, the employer will obtain union approval of the program.

SUPERVISION:

The employer agrees to assign one member of her/his organization (journeyman, foreman, or other qualified employee) to be responsible for the training of the student.

As this program is supervised by the _____ High School, it will be necessary for the school's teacher-coordinator to be admitted to the employer's premises whenever she/he needs to observe and evaluate the student. The teacher-coordinator will conduct her/his observations so that there will be a minimum of interference with the employer's business.

REPORTS:

At six (6) week intervals the employer's representative will prepare a report on the student's progress using the form supplied by the school.

*Reprinted from Zero in on Cooperative Vocational Education, U.S. Department of Health, Education and Welfare, Office of Education Publication, January, 1974, pp. 15-16.

TRAINING AGREEMENT
(Continued)

STUDENT RESPONSIBILITY:

The student-learner shall be subject to all plant regulations applying to other employees.

All complaints shall be made to and adjusted by the teacher-coordinator.

The student may not change her/his place of employment without the approval of the teacher-coordinator.

The student, while in the process of training, will have the status of student-learner, neither displacing a regular worker nor substituting for a worker that ordinarily would be needed by the agency.

WORK EXPERIENCE:

The following will be included in the student-learner's work experience:

1. _____ 5. _____
2. _____ 6. _____
3. _____ 7. _____
4. _____ 8. _____

This agreement may be terminated by the employer at any time after consultation with the teacher-coordinator. The teacher-coordinator may terminate this agreement after consultation with the employer.

_____ _____
Student-Learner Date

_____ _____
Company Representative Title

_____ _____
Teacher-Coordinator

_____
Parent or Guardian

EXAMPLE DOCUMENT #3

Training Plan for
Dietitians Assistant (Hospital)*

Student's Name _____ Job Station _____ Employer _____

JOB TRAINING	Observed	Helped	Performed	RELATED INFORMATION	Date Started	Date Completed
1. INTRODUCTION TO DIETETICS				The duties of the Dietitian Planning and cooking Supervision of meal preparation Purchasing foods and equipment Sanitation Keeping records and reports		
Maintain sanitary conditions.				Sanitation Food borne infections Food poisoning Food spoilage Preservation of foods Additives Laws concerning Commercial Food Services (County Sanitarian can give this information to you.)		
Care and operation of equipment. Identify kinds of utensils. Cleaning machinery. Sharpen and adjust tools. Operation of equipment. Washing tools by hand. Washing tools of machine.				Cleaning tools and equipment Maintenance of tools and equipment. Safety procedures Detergents and soaps used for washing and cleaning.		

*Adapted from An Articulated Guide for Cooperative Occupational Education. Division of Vocational and Technical Education, Illinois Office of Education, no date, pp. 175-178.

JOB TRAINING	Observed	Helped	Performed	RELATED INFORMATION	Date Started	Date Completed
2. PRINCIPLES OF NUTRITION Estimating dietary needs.				Nutrition Deficiencies Food habits Carbohydrates Fats and Lipids Proteins Minerals Vitamins		
Planning a Meal.				Caloric allowances Using tables for meal planning		
Meeting recommended allowances.				Planning the meal to meet personal and family needs		
Shopping and ordering.				Purchasing at the market Economy buying for quality and quantity		
Planning meals for: Expectant mothers				Nutrition demands during pregnancy Food selection Complications on valuing the diet Diet during labor Diet following delivery Diet in lactation		
Infants				Breast feeding Formula: Types and preparation Digestive disturbances of infants Feeding premature infants		
Growth				Diet in early childhood Diet for children of elementary school age Diet for boys and girls of high school age		
Adults				Adult nutrition Food habits of older people Food requirements for the aged		
3. DIET IN DISEASES Feeding patients				Factors to consider when feeding a patient Nutritional status of patients		
Feeding the chronically ill or long term patient				Psychological factors		

JOB TRAINING	Observed	Helped	Performed	RELATED INFORMATION	Date Started	Date Completed
Preparing the basic hospital diet.				The basic hospital diet The progressive diets Diet modification Nutritional adequacy of diets		
Preparing meals for: Overweight people				Life expectancy and body weight Obesity Diet for overweight patients		
Underweight people				Diet for underweight patients		
Preparing diets for the diabetic patient.				Diet therapy for diabetics		
Preparing diets for surgical patients and patients with burns.				Preoperative diets Postoperative diets. Diets for patients with burns		
Preparing diets and feeding patients in infancy and early childhood.				Nutritional problems of sick children Feeding infants and the difficulties of Deficiency diseases of infants Infections Nutritional problems of crippled children Common diseases in children		
4. FOOD SELECTION AND PREPARATION Planning Therapeutic diets				Low caloric diets Diabetic recipes High caloric, high protein recipes Allergy recipes Ketogenic recipes Gluten-free recipes		
Preparing eggs				Vegetables Breads Desserts Food value Digestability Principles of cookery		
Cooking or preparing cereals				Types of cereals Food value Digestability		
Preparing desserts				Function of desserts Recipes		

JOB TRAINING	Observed	Helped	Performed	RELATED INFORMATION	Date Started	Date Completed
Preparing and cooking meats and poultry				Timing and temperature control methods Safe meat Types of meat Types of poultry Food value Digestability General principles of cookery Effects of cooking on food value Care of meat Meat recipes		
Cooking broths, soups and juices of meat & poultry products				Broths, soups and juices		
Preparing and cooking sea foods				Food value Shellfish Place in the menu Selection of seafood for cooking Recipes for sea food		
Cooking and preparing vegetables				Classification of vegetables Canned vegetables Frozen vegetables Dehydrated and fried vegetables Preparation and cooking of vegetables Place in the menu Food values of vegetables		
Preparing salads and relishes				Leafy vegetables in salads Other salad vegetables Salad combinations Salad dressings Salads and relishes in the menu Recipes for salads Recipes for dressings		
Preparing, cooking and using soups				Ready to use soups Clear soups Unthickened milk soups, chowders and stews Cream soups		
Making breads, batters, and doughs				Grain for breads Yeast bread standards Yeast in bread making Toast recipes Sandwich recipes Quick breads Biscuit and muffin recipes		

JOB TRAINING	Observed	Helped	Performed	RELATED INFORMATION	Date Started	Date Completed
Measuring and testing of Foods Use of Tables				Composition of foods Part Edible portion in common measures Food composition tables for short method of dietary analysis Cholosteral content of foods Sodium and Potassium content of foods, seasonings & beverages Acid base reaction of foods Blood and urine contents Equivalent weights and measures Average weight and height tables Height and weight tables for men and women		

EXAMPLE DOCUMENT #4

COOPERATIVE OFFICE EDUCATION TRAINING PLAN*

School Year 1977/78

Student Trainee Dana Barnes Career Objective Clerk Stenographer

Firm Consolidated Industries Job Title Clerk Typist

Training Station	Evaluation**			
SKILL DEVELOPMENT	10/10	11/21		
Typing				
Letters from rough draft	G	G		
Envelopes	G	E		
Invoices	NI	G		
Offset masters	NI	NI		
Itinerary		G		
Statistical typing				
Machines				
Ten-key adding	G	E		
Photo copier		E		
Electronic calculator				

Related Instruction	Evaluation			
SKILL DEVELOPMENT	10/11	11/22		
Typing				
Skill Building	G	G		
Correction procedures	NI	G		
Proofreading	NI	NI		
Offset masters	NI	NI		
Statistical typing				
Telephone Techniques	NI	G		
Machines				
Proportional spacing typewriter	G			
Ten-key adding	E			
Photo copier		E		
Electronic calculator				
Shorthand				
Speed building	G	G		
Machine transcription	NI	G		

*Adapted from the Ohio Cooperative Office Education Training Plan Project Manual, Nelson Madden, Director, Kent State University, Kent, Ohio, 1977, pp. 29-30.

**Evaluation Code

E = Excellent
G = Good
NI = Needs Improvement

Training Station					Related Instruction				
KNOWLEDGES	Evaluation				KNOWLEDGES	Evaluation			
Filing	10/10	11/21			Filing	10/11	11/22		
Correspondence		E			Numerical	G	E		
					Communications				
					Verbal	NI	G		
					Letter composition	NI	NI		
					Offset duplicating process				
Compiling statistical information					Sales invoicing procedures	G			
					Itinerary format and use		G		
PERSONAL AND PROFESSIONAL DEVELOPMENT					PERSONAL AND PROFESSIONAL DEVELOPMENT				
Attendance	G	E			Attendance	E	E		
Initiative	G	G			Grooming and hygiene	G	G		
Cooperation	G	E							
Adaptability	G	NI			Social skills and etiquette	E	E		
Reliability									
Quality of work					Human relations	G	G		
					Leadership				
					Service project chairperson				

EXAMPLE DOCUMENT #5

COOPERATIVE EDUCATION EVALUATION*

Student-Learner_____ Employer_____

			QUARTER			
			1	2	3	4
1.	CO-OPERATION *Includes attitude toward work, company, supervisors, and associates; willingness to work with and for others.*	Unusually cooperative; favorable influence on associates	0	0	0	0
		Cooperates very well. Respected by co-workers	0	0	0	0
		Usually a good team worker	0	0	0	0
		Sometimes shows reluctance to cooperate	0	0	0	0
		Does not cooperate	0	0	0	0
2.	INITIATIVE OR WILLINGNESS TO LEARN *Consider time required to learn new duties, methods; ability to grasp explanations.*	Self starting. Grasps new ideas or duties immediately	0	0	0	0
		Learns quickly. Needs little instruction	0	0	0	0
		Normal ability in learning new ideas	0	0	0	0
		Requires detailed instructions	0	0	0	0
		Instructions must be repeated many times	0	0	0	0
3.	PUNCTUALITY AND ATTENDANCE *Consider general record of absenteeism and tardiness; promptness in returning from rest periods.*	Outstanding	0	0	0	0
		Very dependable	0	0	0	0
		Satisfactory	0	0	0	0
		Could improve	0	0	0	0
		Unsatisfactory	0	0	0	0
4.	PERSONAL APPEARANCE *Consider general type of work being done.*	Outstanding	0	0	0	0
		Very satisfactory	0	0	0	0
		Satisfactory	0	0	0	0
		Could improve	0	0	0	0
		Unsatisfactory	0	0	0	0
5.	QUALITY OF WORK *Entails accuracy, thoroughness, high quality work, and dependability of results; ability to turn out work which meets high quality standards.*	Quality of the highest possible standards	0	0	0	0
		Seldom makes errors. Follows instructions accurately	0	0	0	0
		Work of good quality and requires little checking	0	0	0	0
		Quality variable. Work needs careful inspection	0	0	0	0
		Poor quality work. Frequent errors	0	0	0	0
6.	QUANTITY OF WORK *Consider amount of satisfactory work performed under normal conditions.*	Consistently high output	0	0	0	0
		Good output	0	0	0	0
		Satisfactory output	0	0	0	0
		Slightly below average output	0	0	0	0
		Low output	0	0	0	0

*Reprinted with permission from District #204, Joliet Township High Schools, Joliet, Illinois, May, 1978.

7. KNOWLEDGE OF JOB *Consider familiarity with requirements of job gained through experience, education, or specialized training.*	Does not require constant supervision; maintains high quality/quantity output	0	0	0	0
	Very good knowledge of job. Seldom needs instruction	0	0	0	0
	Adequate knowledge of job	0	0	0	0
	Requires more than average supervision and instruction	0	0	0	0
	Inadequate knowledge to perform job. Requires excessive supervision	0	0	0	0

8. ADDITIONAL COMMENTS:

Supervisor's Signature _____ Date _____ CAMPUS

Supervisor's Signature _____ Date _____ East ____

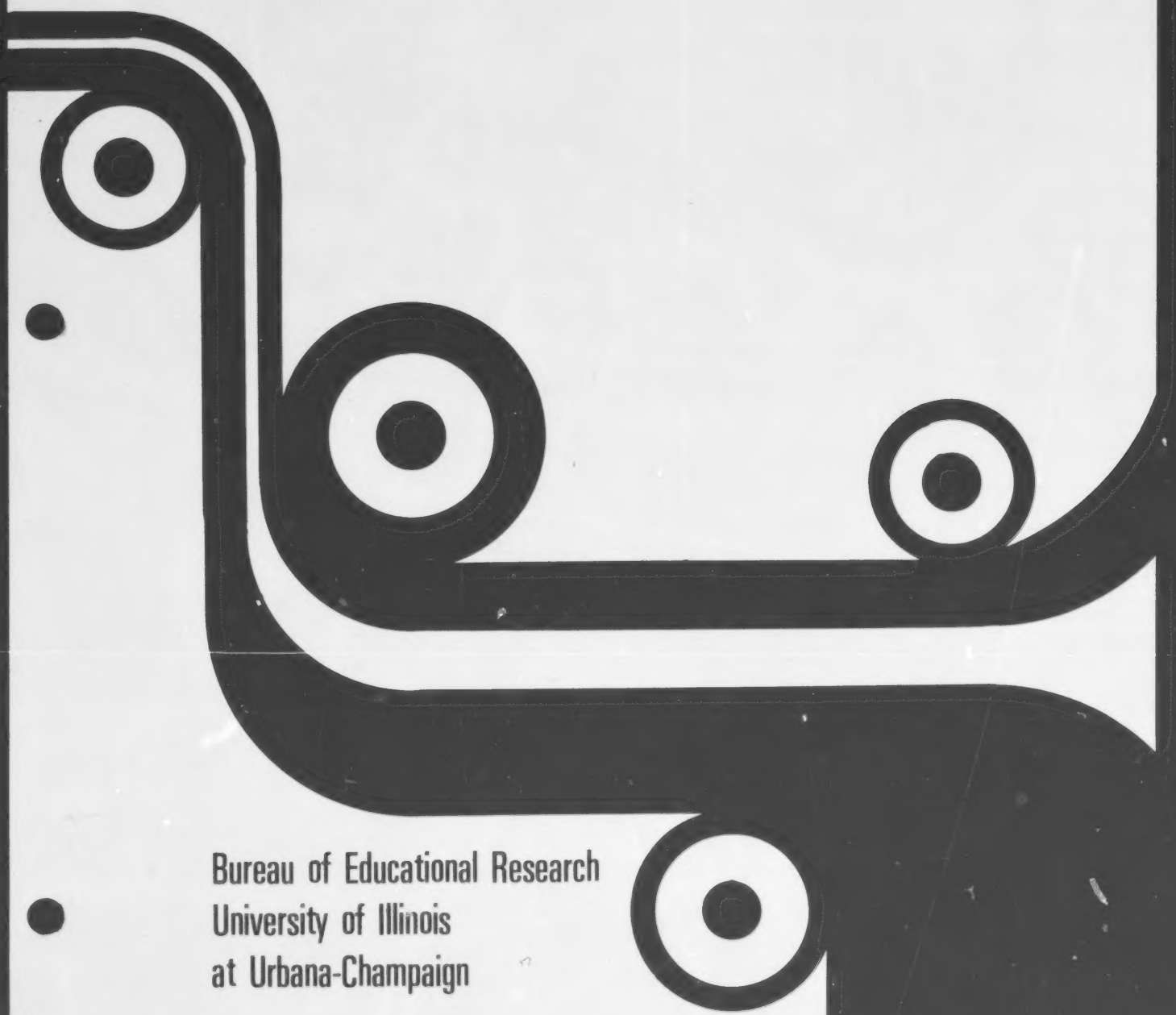
Supervisor's Signature _____ Date _____ West ____

Supervisor's Signature _____ Date _____ Central ____

LETTER GRADE: A B C D E 1st Quarter *(Circle appropriate choice)*
A B C D E 2nd Quarter
A B C D E 3rd Quarter
A B C D E 4th Quarter

6

ASSESSING VOCATIONAL SKILL DEVELOPMENT



Bureau of Educational Research
University of Illinois
at Urbana-Champaign

6

INSTRUCTOR'S GUIDE

ASSESSING VOCATIONAL SKILL DEVELOPMENT

Len Albright

Special Needs Identification and Assessment Project
Bureau of Educational Research
University of Illinois
at Urbana-Champaign

Rupert N. Evans, Director
Len Albright, Principal Investigator
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The report presented herein was prepated pursuant to Grant No. OEG007604835 from the Bureau of Occupational and Adult Education, U.S. Office of Education, Department of Health, Education and Welfare. The opinions expressed herein, however, do not necessarily reflect the position or policy of the U.S. Office of Education and no official endorsement should be inferred.

INTRODUCTION

This guide is concerned with the assessment of student performance[1] in a vocational setting. Several techniques for systematically observing and recording learner progress are suggested. The data collected on student performance are to serve two purposes: 1) to assist in determining the learner's level of proficiency on a given task or tasks, and 2) to identify specific modifications which need to be made in the learner's instructional program to increase skill development. In both cases, performance assessment data provide the instructor with important feedback concerning the teaching-learning process.

GUIDELINES AND CONSIDERATIONS

When assessing student performance on a given task or tasks, the vocational instructor may use one or both of two approaches: 1) by observing and recording performance during a task, and 2) through observing and rating the end result, the product of the student's performance. The first strategy is commonly referred to as process assessment, whereas the second strategy is frequently termed product assessment. Erickson and Wentling (1976) illustrate the difference between and the importance of both types of assessment, by using the task of typing a business letter. Product assessment can readily be accomplished by observing the finished product, the typed letter, and judging it according to specified criteria such as accuracy, spacing

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[1] Performance assessment, as used herein, refers to the measurement of the learner's level of competence in completing an employment-related task or tasks.

and neatness of corrections. By focusing on the product alone, the instructor may overlook some important performance deficiencies. For instance, the student may have used the hunt and peck method for this exercise. Although the student met the product criteria for this task, in terms of later speed and performance in a secretarial position this method of typing would be inappropriate. Direct observation of the student while she/he is typing the letter (process assessment) would reveal such shortcomings. In this example, like many vocational tasks, it is important to focus on both process and product variables.

Let's now examine process and product assessment in greater detail. Suggestions for designing and using observational measures are provided.

I. Conducting Process Assessments

Process assessments can be very helpful during the early stages of learning. Through careful observation, the teacher can diagnose student difficulties and take corrective steps before inappropriate patterns set in. This practice is especially important in situations that call for special safety precautions and proper use of tools and equipment.

If a thorough analysis of the task has been conducted, the instructor can use this analysis in checking student progress. Figure 1 on page 3 provides an illustration of how this can be done for the task of cleaning and adjusting a spark plug. The initial steps (or subtasks) for completing this task are listed in the left hand column. The number of times practiced (or trials) and the degree of success (+) or difficulty (-) during each trial are also recorded.

As seen in Figure 1, the student was unsuccessful in performing subtasks 2, 3 and 4 during the first trial. The instructor observed these occurrences and provided additional instruction. As a result, the frequency of errors decreased on the second trial and totally disappeared in three successive practices. By having the student perform the four steps three times in a row, without errors or assistance, correct responses were reinforced. A further advantage of this practice is the instructor now has a strong basis for concluding that learning has occurred and that the probability of the student demonstrating this skill in an actual work setting is very high.

A modified version of the process assessment checklist used in Figure 1 is located in Example Document #1. In this example, the process assessment relates to the use of a commercial washer and dryer.

Figure 1

Task Performance Checklist

Task(s) Cleaning & Adjusting a Sparkplug Student Michelle Ansley

Observation Date(s) 10/12/77

Subtasks*	Number of Trials				
	1	2	3	4	5
1. Pick up and place plug in a solution solvent	+	+	+	+	+
2. Remove and place plug in plug holder jig with bottom up	−	+	+	+	+
3. Wire brush until clean (use clean condition picture for comparison)	−	+	+	+	+
4. Determine plug gap by using different size gauges and placing them between the gap until appropriate size is located	−	−	+	+	+

*These subtasks were extracted from a task analysis in Instructional Development for Special Needs Learners by L. Allen Phelps, Department of Vocational-Technical Education, University of Illinois, Urbana, 1976, p. 195 (ED 133-940).

II. Conducting Product Assessment

The assessment of the outcome or product of learner activity is, in general, less difficult than attempting to rate the processes involved in developing the product. For example, it is easier to assess a product from a printing press than it is to rate the sequence and adequacy of the processes used in printing that particular product. This tends to be true because the criteria for measuring a product are usually prespecified and are often stated in absolute terms. In contrast, there may be many different ways to successfully complete the product.

If the criteria for measuring products are absolute such as "plus or minus .01 inches" or "within 20 minutes with no errors" then a yes-no or pass-fail checklist would be appropriate. If, however, there is a "range of correctness" then a graphic rating scale could be used. Example Document #2 provides a sample graphic rating scale for measuring the product of a woodworking project.

III. Conducting Process and Product Assessments

In many employment-related tasks both process and product aspects are considered significant and need to be assessed. The work-education coordinator, for example, usually focuses in on process and product performance when observing the student on a job station (See Example Document #5, Guide 5). In the building trades entry level performance evaluation sample in Guide 3 (Example Document #5c) both process and product variables were considered.

As suggested earlier, process performance is typically emphasized during the early stages of learning and product performance later, after the process skills have been mastered.

IV. Using Rating Systems to Measure Student Performance

Two instruments for use when observing and recording student performance have been suggested: 1) a checklist, and 2) a graphic-rating scale. Checklists enable the instructor to assess specific performance skills. In addition, checklists are useful when many behaviors occur in a short period of time. For instance, in assessing the student during a sales transaction such items as appearance, sales approach and accuracy of information given would likely be considered. A simple check sheet could be completed during this activity and serve as a helpful tool in a follow-up discussion with the student.

The instructor need not be the only person to rate student performance. With some preparation others can use a rating scale to evaluate student performance, such as the student's peers, employers, supervisor's or laboratory assistants. In addition, the student can use the rating scale to rate her/his own work.

Rating scales can serve as a reliable indicator of student proficiency if several different aspects of performance are rated

separately. By including different aspects of the skill in the rating scale we provide clues for ourselves and our students as to the areas of student competence and inadequacy. For example, in a woodworking course on building furniture we could use the following rating scale:

	Choice of Materials	Finish	Joints	Overall Design
Excellent				
Good	✓		✓	✓
Needs work		✓		

Rating scales and checklists do not always provide the student with sufficient information which he or she can use in order to reach the desired level of performance. These assessment tools tell the student where additional work needs to be done, but seldom tell the student what might be done differently. Instructor comments can provide such information. It is especially helpful if such comments are in written form and accompany the observation instrument. Let's, for example, take a look at two different types of feedback provided to the student who build a bookcase.

Weak	Better
Your joints are inadequate.	You used simple mitered joints with glue and screws with plugs to cover screw heads. You could have gotten a "cleaner" effect with dado joints and veneer edge strips along the front and back edges.
Finish is incomplete and inappropriate.	First, you might consider finishing the back of the shelves so that the case could be positioned anywhere in the room. Secondly, the design is rather "Scandanavian" --a more natural finish of sealer and tung oil would have brought out the grain and given warmth to the rather stark but clean lines of the case.

It is apparent from the comment at the left that the student made mistakes in joints and finish. From the comments on the right, however, more information is provided. The student can see that the joint and finish were really "OK" in terms of technical skill, but the instructor expects more than technical ability. Furthermore, the student will likely see her/his work as being important since the instructor went into such detail over the case. Such comments can be very effective in providing the student with a more accurate picture of her/his own abilities.

Another important consideration in designing a checklist or a rating scale is to choose a procedure that will allow quick, easy-to-read displays that can be readily understood by the student, other instructors, administrators and parents.

The use of the checklist and the rating scale were reviewed. Variations of these are possible (i.e., ranking, product and numerical scales) and can be adapted for individual use. For a more detailed discussion on this subject see Measuring Student Growth by Richard C. Erickson and Tim L. Wentling, Allyn and Bacon, 1976.

FOR FURTHER INVESTIGATION

For additional information on conducting performance assessments in vocational settings see:

Bloom, Benjamin S.; Hastings, Thomas and Madaus, George F. Handbook on Formative and Summative Evaluation of Student Learning. New York: McGraw-Hill Book Company, 1971.

Boyd, J. L. and Shimberg, B. Handbook of Performance Testing. Princeton, New Jersey: Educational Testing Service, 1971.

Brolin, Donn E. Vocational Preparation of Retarded Citizens. Columbus, Ohio: Charles E. Merrill, 1976.

Erickson, Richard C. and Wentling, Tim L. Measuring Student Growth: Techniques and Procedures for Occupational Education. Boston, Mass.: Allyn and Bacon, Inc., 1976.

Gronlund, Norman E. Constructing Achievement Tests. Second Edition. Englewood Cliffs, New Jersey: Prentice-Hall Inc., 1977.

Wentling, Tim L. Measurement and Evaluation for the Special Needs Learner. Industrial Education, May-June, 1978, pp. 29-32.

EXAMPLE DOCUMENT #1

Process Assessment Checklist*

Unit: Care of Clothing Student: Marvin Neal

Task: Use of Commercial Washer and Dryer Date: 2/16/78

Subtasks	Performance on Subtasks	Comments
1. Separate clothing according to proper colors.	+	
2. Place separate clothes in washer, select proper setting according to color.	-	Needed help in determining proper setting--hot, warm, cold.
3. Measure correct amount of soap to be used for each load of clothes.	+	Knows proper amounts.
4. Select and determine the correct amount of change to operate washer.	+	Understands the correct amount of money to use.
5. Upon doing the above steps close washer lid and start machine.	+	Understands how to start machine.
6. Place fabric softener into machine during rinse cycle.	+	Demonstrated after being told proper amount to be used.
7. Remove clothes when machine stops completely.	+	Understands the safety factor involved.
8. Sort permanent press garments from those requiring normal setting. Select setting.	-	Needed help in determining setting.
9. Place proper coins into dryer after separating clothes and putting garments into dryers.	+	Understands this subtask.
10. Fold or hang all garments neatly.	-	Needs to work on folding so that wrinkles don't develop.
Recommendation: Work with Marvin on subtasks 2, 8 and 10. Then, have him do the total task independently on two separate occasions.		

*Modified and used by Albia High School, Albia, Iowa.

EXAMPLE DOCUMENT #2

Product Assessment Form for a Woodworking Project*

1. Evidence of excessive glue under finish/Damage from glue

1	2	3	4	5	6	7
Bubbles of glue under finish		Considerable discoloration		Slight discoloration		No evidence of glue

2. Evidence of clamp damage

1	2	3	4	5	6	7
Splitting		Deep impressions		Marred surface		No evidence of clamps

3. Evidence of inconsistent clamping pressure in assembly (squareness)

1	2	3	4	5	6	7
Parts do not fit		Considerable warp		Some distortion		All parts square

4. Evidence of lamination problems

1	2	3	4	5	6	7
Splitting/ open joint		Buckling/ wide joint		Slight offset		Flat/tight joint

5. Evidence of the improper use of fasteners (screws)

1	2	3	4	5	6	7
Not holding/ head-stripped		Loose/head damage		Poor seating		Secure/no head damage

6. Evidence of the improper use of fasteners (finish nails)

1	2	3	4	5	6	7
Bent nail/ surface damage		Nail showing		Under or overfilled		Fill blends with surface

*Adapted from Handbook on Formative and Summative Evaluation of Student Learning by Bloom, Hastings and Madaus. Copyright 1971, McGraw-Hill Book Company. Used with permission of McGraw-Hill Book Company.

7

MONITORING THE STUDENT'S INDIVIDUALIZED VOCATIONAL PLAN

Bureau of Educational Research
University of Illinois
at Urbana-Champaign

7

INSTRUCTOR'S GUIDE

MONITORING THE STUDENT'S INDIVIDUALIZED VOCATIONAL PLAN

Len Albright

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The report presented herein was prepared pursuant to Grant No. OEG007604835 from the Bureau of Occupational and Adult Education, U.S. Office of Education, Department of Health, Education and Welfare. The opinions expressed herein, however, do not necessarily reflect the position or policy of the U.S. Office of Education and no official endorsement should be inferred.

INTRODUCTION

The degree to which the student's IVP is successfully implemented will largely be determined by the procedures used to assess student progress throughout the school year. The plan itself is of limited worth unless specific strategies for reviewing and updating are established and implemented. The purpose of this guide is to offer a system for monitoring and reporting student progress.

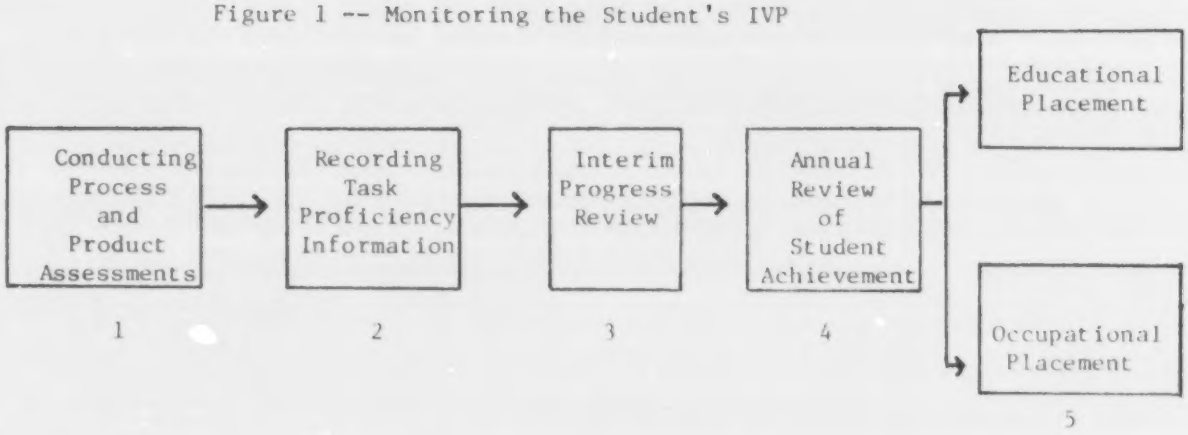
GUIDELINES AND CONSIDERATIONS

Suggestions for conducting process and product assessments were offered in Guide 6. These assessments are basically task specific. The information gathered is to be used by instructor and student to increase performance on a given task. Although there may be occasion to share these data with others, the main use is for serving as a feedback mechanism between instructor and student.

The information offered within this guide has a similar intent and could be viewed as an expansion of Guide 6. Data on student task proficiency are to be collected throughout the school year and reported to the IVP team members to determine if modifications in the learner's program are in order. Suggestions for organizing these data and for reporting the information to IVP team members are presented in this section.

Figure 1 graphically portrays the tie-in between performance assessment activities (Guide 6) and activities related to monitoring the student's IVP.

Figure 1 -- Monitoring the Student's IVP



The first four stages in Figure 1 encompass the major data collection and information reporting points during the course of the school year. The fifth stage represents student placement following program completion, either in the world of work or continued tenure in an educational setting. In the case of concurrent work-education program placement, both would occur simultaneously. Also, the student's placement could be from a secondary level program to a post-secondary institution. Stage 5 will receive further attention in Guide 8 (Conducting Student Follow-up) and Guide 9 (Conducting Employer Follow-up). The information remaining in this section will concentrate on Stages 1 through 4.

Stage 1 - Conducting Process and Product Assessments

The data collected on the level of student competence in employment-related tasks (Guide 6) are to be used in developing a cumulative profile on student progress. The format for, and the use of this profile is presented in subsequent stages.

Stage 2 - Recording Task Proficiency Information

A continuous recording of student proficiency can be maintained through the use of the Learner Task Proficiency Profile. A completed sample copy of this profile, along with a cover sheet for identifying the learner and her/his progress levels can be found in Example Document #1. A detailed description of how to use the Learner Task Proficiency Profile is presented in Example Document #2a. A blank copy of this profile is located in Example Document #2b.

Stage 3 - Interim Progress Review

Procedures for periodic review and update of the student's IVP will be necessary to examine the feasibility of the plan in view of the learner's current level of functioning. This review is to be conducted by the IVP team members. The Learner Task Proficiency Profile should serve as the tool for reporting the student's present achievement level to the team. The profile is to be discussed in relation to the content within the IVP. For instance, a comparison can be made between special services identified in the original plan and special services delivered to date. If a discrepancy is discovered, and the team considers this to have an adverse effect on student performance, then corrective measures will need to be taken, with the plan adjusted accordingly.

It is recommended that, at a minimum, an interim progress review be conducted at mid-year (January) or at a time near the end of the first semester.

Stage 4 - Annual Review of Student Achievement

The annual review of the student's achievement is to be held toward the closing of the school year. It is during this review that the IVP team examines the degree of student progress made and services delivered during the school year. This is to be accomplished by comparing the Learner Task Proficiency Profile with the original IVP. If the student is to continue at the public school secondary level, the team should prepare recommendations for educational placement. If graduation is in sight, or the student has decided to leave school, then the discussion should center on job placement concerns and follow-up plans. In addition to the annual review, the learner's profile can serve as a useful tool in communicating performance information to a variety of audiences such as prospective employers, outside training agencies and future instructors.

FOR FURTHER INVESTIGATION

For additional information on the subject of monitoring the learner's individualized plan see:

Blankenship, Colleen. Illinois Interim Resource Manual for Preparing Individualized Education Programs. Springfield, Illinois: Specialized Educational Services Department, Illinois Office of Education, 1977.

Cegelka, Patricia T. and Phillips, Misha W. Individualized Education Programming at the Secondary Level. Teaching Exceptional Children, Spring, 1978, pp. 84-87.

Phelps, L. Allen and Lutz, Ronald J. Career Exploration and Preparation for the Special Needs Learner. Boston, Mass.: Allyn and Bacon, Inc., 1977.

Phelps, L. Allen and Wentling, Tim L. A Proposed System for the Identification, Assessment and Evaluation of Special Needs Learners. Journal of Industrial Teacher Education, Spring, 1977, pp. 19-35.

Torres, Scottie (ed.). A Primer on Individualized Education Programs for Handicapped Children. Reston, Virginia: Foundation for Exceptional Children, 1977.

EXAMPLE DOCUMENT #1

A LEARNER TASK PROFICIENCY PROFILE*

for

Mary Phils

Area of Vocational Preparation Horticulture Instructor(s): Betty Smith (Voc. Instructor)

School: Maple Grove High School Ed James (Remedial Instructor)

The above-named student has demonstrated the occupational skills described by the attached form. The criteria described below can be used to interpret the level of skill development attained by the student.

Occupational Performance

- *Introduced - the student/learner has become acquainted with the general task, as well as its function and/or purpose through previous experiences or instruction. However, the learner has not yet begun to develop or demonstrate any significant, recognizable competency in performing the task.*
- *Partial Mastery - the student/learner has begun to develop and/or demonstrate minimal competence in performing selected parts of the task.*
- *Mastery - the student/learner has developed and/or demonstrates a satisfactory level of competence in performing this task.*

Special Assistance/Services Provided

- *Introduced - the student/learner has become acquainted with the basic skill or concept through previous experience and/or instruction.*
- *Partial Mastery - the student/learner has demonstrated some capacity to perform the basic skill, and/or interpret and apply the basic concept.*
- *Mastery - the student/learner is capable of accurately and repeatedly performing the basic skill, or interpreting and applying the basic concept.*

*This profile represents a modified version of the Learner Performance Record appearing on pages 330, 331 and 333 in Phelps, L. Allen and Lutz, Ronald J., Career Exploration and Preparation for the Special Needs Learner. Allyn and Bacon, Inc., 1977. Permission granted for use herein by both publisher and authors.

EXAMPLE DOCUMENT #1

LEARNER TASK PROFICIENCY PROFILE

PART A: Occupational Performance — Learner: Mary

OCCUPATIONAL TASKS (LEARNER PROGRESS)	Introduced	Partial Mastery	Mastery		DESCRIPTIVE ASSESSMENTS	DATE
Receiving customer orders over the telephone	✓			1	can describe the steps involved	10/5
		✓		2	needs to improve initial greeting and price quotation responses	10/9
			✓	3	can perform local transaction efficiently and efficiently	10/18 - 10/24
Operating the cash register				1		
		✓		2	is accurate in recording but needs to increase speed	11/1
				3		
				1		
				2		
				3		
				1		
				2		
				3		
				1		
				2		
				3		

PART B: Special Assistance/Services Provided — Learner: Mary

BASIC SKILLS/CONCEPTS — LEARNER PROGRESS	Introduced	Partial Mastery	Mastery		DESCRIPTIVE ASSESSMENTS	DATE
making change				1		
		✓		2	can readily handle transactions involving even numbers	11/2
			✓	3	can make add and even change transactions (6 out of 6 trials)	12/6
				1		
				2		
				3		
				1		
				2		
				3		
				1		
				2		
				3		
				1		
				2		
				3		

-7-

EXAMPLE DOCUMENT #2a

Guidelines for Using the Learner Task Proficiency Profile

1. Part A of the profile focuses on assessment of specific occupational competencies. On the front side of the form there are spaces for occupational tasks to be evaluated. A task is a short-term objective which was discussed and developed in Guide 4. For each cluster or unit area, a descriptive task statement should be placed in the box on the left of the form.

2. Three different levels of learner progress are used in Part A of the profile. Detailed descriptions of each of these criterion levels are provided on the cover sheet of the profile. In assessing the level of learner progress on a given task, an "x" or check (✓) is placed in the appropriate box and the date of the assessment (rating) is noted in the far right column.

3. To the immediate right of the rating columns, three spaces are provided. These spaces are to be used in describing the specific, operational level of performance attained by the learner. Also, a number appears in each of the three spaces. Ideally, special needs learners should be assessed prior to the instruction (#1), during instruction (#2), and at the termination of instruction (#3). As each level of progress is attained, specific descriptive criteria should be added for each rating.

   For instance, suppose that at the time of the first rating a learner is rated as "partial mastery" in a given task. Greater understanding of what is meant by the "partial mastery" rating is also needed. Under "Descriptive Assessments" a brief statement indicating that for the task of "typing business letters" the learner can already perform this task at "40 words/minute with less than 5 errors." These latter phrases would be needed to describe specifically what is meant by the rating of "partial mastery." These phrases are based on the criteria established for each task. Similar descriptive assessments should be entered on the profile form whenever a rating is made.

4. Part B of the profile (Special Services/Assistance Provided) involves compiling assessment results on the learner's attainment of basic skills/concepts. Here the basic skills/concepts in which specific remediation or special instruction is given should be listed. Not all basic skill areas need to be listed--only those for which specific service was provided, as identified on the learner's IVP. The vocational instructor should work with the person(s) providing special services in preparing Part B of the profile (e.g., reading specialist, counselor, tutor).

   The three levels of learner progress for Part B are related to skills/concepts taught in special service areas. If, for example, the occupational instruction focused on stock handling, one of the basic skills taught by the person providing special instruction may have been "reading requisition forms" or "adding column totals." The learner's progress in each of these basic skills is assessed and

rated periodically in a manner similar to that used in Part A. Check marks or dots can be placed in the appropriate boxes when certain levels of progress are achieved. Here again, brief descriptive assessment statements should also be provided.

Example Document #1 provides a further illustration of how the Learner Task Proficiency Profile is to be completed.

EXAMPLE DOCUMENT #2b

A LEARNER TASK PROFICIENCY PROFILE

for

_____

Area of Vocational Preparation_____ Instructor(s):_____

School:_____ _____

The above-named student has demonstrated the occupational skills described by the attached form. The criteria described below can be used to interpret the level of skill development attained by the student.

Occupational Performance

- *Introduced - the student/learner has become acquainted with the general task, as well as its function and/or purpose through previous experiences or instruction. However, the learner has not yet begun to develop or demonstrate any significant, recognizable competency in performing the task.*

- *Partial Mastery - the student/learner has begun to develop and/or demonstrate minimal competence in performing selected parts of the task.*

- *Mastery - the student/learner has developed and/or demonstrates a satisfactory level of competence in performing this task.*

Special Assistance/Services Provided

- *Introduced - the student/learner has become acquainted with the basic skill or concept through previous experience and/or instruction.*

- *Partial Mastery - the student/learner has demonstrated some capacity to perform the basic skill, and/or interpret and apply the basic concept.*

- *Mastery - the student/learner is capable of accurately and repeatedly performing the basic skill, or interpreting and applying the basic concept.*

LEARNER TASK PROFICIENCY PROFILE

PART A: Occupational Performance *Learner:*

OCCUPATIONAL TASKS	LEARNER PROGRESS	Introduced	Partial Mastery	Mastery	DESCRIPTIVE ASSESSMENTS	DATE
					1	
					2	
					3	
					1	
					2	
					3	
					1	
					2	
					3	
					1	
					2	
					3	
					1	
					2	
					3	

PART B: Special Assistance/Services Provided *Learner:*

BASIC SKILLS/CONCEPTS	Introduced	Partial Mastery	Mastery	DESCRIPTIVE ASSESSMENTS	DATE
				1	
				2	
				3	
				1	
				2	
				3	
				1	
				2	
				3	
				1	
				2	
				3	
				1	
				2	
				3	

8

CONDUCTING STUDENT FOLLOW-UP

Bureau of Educational Research
University of Illinois
at Urbana-Champaign

8

INSTRUCTOR'S GUIDE

CONDUCTING STUDENT FOLLOW-UP

Len Albright and John Fabac

Special Needs Identification and Assessment Project
Bureau of Educational Research
University of Illinois
at Urbana-Champaign

Rupert N. Evans, Director
Len Albright, Principal Investigator
John Fabac, Project Assistant

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The report presented herein was prepared pursuant to Grant No. OEG007604835 from the Bureau of Occupational and Adult Education, U.S. Office of Education, Department of Health, Education and Welfare. The opinions expressed herein, however, do not necessarily reflect the position or policy of the U.S. Office of Education and no official endorsement should be inferred.

INTRODUCTION

This guide focuses in on procedures for conducting a follow-up of special needs learners who have completed the vocational program and who may now be engaged in work and/or continued education. While some of the suggestions for student follow-up offered herein apply to all program graduates, many take into account the unique aspects involved in following-up students with special needs.

By conducting a follow-up of former special needs learners, the instructor can obtain a reading on particular difficulties, if any, experienced by the students in their transition from school to work. This information should be useful in determining areas within the current course (or program) needing expansion and/or revision and should, therefore, prove helpful in assisting presently enrolled and future learners. In addition, a follow-up could identify additional services needed by individual former students.

GUIDELINES AND CONSIDERATIONS*

The information which follows will take you through four major steps for conducting a follow-up of former special needs learners. These four steps are: 1) planning the follow-up activity, 2) preparing the follow-up instrument(s), 3) conducting the follow-up and 4) summarizing and reporting the results. Let's take a closer look at each step.

---

*Several of the suggestions appearing in this section were adapted from:

Phelps, L. Allen. Instructional Development for Special Needs Learners: An Inservice Resource Guide. Urbana-Champaign, Illinois: Department of Vocational-Technical Education, University of Illinois, 1976 (ED 133-940).

Wentling, Tim L. and Tom E. Lawson. Evaluating Occupational Education and Training Programs. Boston, Mass.: Allyn and Bacon, Inc., 1975.

I. Planning for Student Follow-up

A. It is quite conceivable that follow-up studies have recently been completed in your district. Therefore, you are advised to check with your immediate supervisor to determine the personnel involved in these activities. You may find that follow-up has been conducted for individual programs. Or, your district may have a system-wide follow-up policy for all program graduates. A discussion with the personnel involved in earlier follow-up attempts should: 1) alert you to potential problems in conducting your follow-up, 2) provide you with the opportunity for reviewing existing instruments and procedures, and 3) explore the feasibility of coordinating follow-up activities.

B. Determine the scope of the follow-up activity. Do you plan to follow-up last year's students or will you include graduates from the last five years? Are you going to follow-up on program completers only, or will you include those who dropped out? Will your follow-up include special needs students from some or all vocational programs? If a system-wide follow-up exists for all former students, to what extent are former special needs students considered in the design, implementation and analysis phases of the follow-up?

C. Once the scope has been determined, the major evaluative questions need to be formulated. These questions should focus in on the objectives of the vocational instruction and supportive services received. The following questions may be considered:

- What is the current employment and/or educational status of the student?
- Were the original program objectives and the related instruction relevant to job performance?
- How does the former learner value her/his previous vocational preparation in terms of preparation for employment and/or education?
- To what extent did the supportive services received aid the student in making the transition from school to work?
- What, if any, additional services appear to be needed to help the student function on her/his job?

D. The next step is to determine the method to be used for conducting follow-up for the special needs student. Basically, there are three methods to choose from: 1) the personal interview, 2) the telephone interview, and 3) the mail survey. One, or a combination of the three may be necessary, depending upon the nature of the handicaps of the persons involved. For instance, the telephone or personal interview may be needed for the person with a severe

reading problem. Or, the person with a hearing deficiency may respond best to a mail survey. Additional factors to be considered should include:

- size of the population to be followed up
- amount of monies available for printing, postage and interviewing (e.g., telephone and/or travel)
- number of persons to be involved in conducting the follow-up

II. Preparing the Follow-up Instrument

A. The major evaluative questions presented earlier (I.C.) will need to be broken down into specific questions. These broad questions need to be specified in order to construct an instrument that collects the type of data desired for identifying student needs and for making program related decisions. For example, the question "What, if any, additional services appear to be needed to help the former student function on his/her job?" may be approached by asking the following sub-questions:

- If you were your boss how would you rate your job performance as an employee?

  _____ Excellent

  _____ Above average

  _____ Average

  _____ Needs improvement

- Name one area in need of improvement._____

  _____

- How can this be improved?_____

  _____

- Would you want to discuss this matter with an individual from our school? _____ Yes _____ No

  With whom?_____

B. If several members are working on the development of the follow-up instrument, each member could assume the responsibility for preparing the sub-questions to a particular major evaluation question(s). After the sub-questions are formulated, the group could convene to review, edit and approve the questions to appear on the first draft of the instrument.

C. The person(s) responsible for instrument design will also need to consider the respondent's style of communication. Example Document #1 offers several general considerations which could apply to individuals with hearing, visual, movement or other types of impairments. The person who worked closest with the individual during her or his schooling should be the best source to contact regarding individual needs.

D. Before conducting the actual follow-up, the instrument to be used should be pilot-tested on a sample group of special needs learners who are in school or with a small sample of program graduates. This should be helpful in determining if the instrument/questions are readily understood, and if revisions appear necessary. Example Document #2 provides an evaluation form used for obtaining student critique of a first draft follow-up survey instrument.

E. Example Document #3 presents a completed sample mail questionnaire, with cover letter. A sample interview guide is offered in Example Document #4. These samples can be reviewed for ideas on:

- Descriptive information
- Example questions
- Sequencing of questions
- Format

III. Conducting the Follow-up

A. If an *interview* method (telephone or personal contact) is to be used, the following should be considered:

- Present the questions orally so that they can be simplified and clarified as needed.
- A total communication approach that includes lip reading, finger spelling and signing may be necessary when interviewing the student with a severe hearing impairment.
- Use bilinguists in presenting the follow-up questions and for interpreting the response from students who use English as a second language.

B. If a *mail survey* method is used the following may be helpful in increasing the quantity and the quality of individual responses:

- A preliminary telephone call and/or a postcard mailed to former students prior to actual distribution of the cover letter and instrument are two techniques to prepare students for the forthcoming material.

- A questionnaire that is easy to read, neat, organized, with ample space provided for responses and printed on colored paper has been found to increase the overall return rate (Wentling and Lawson, 1975).

- Code the instruments, so that one can determine who responded to the first mailing and who will need to receive another follow-up contact.

Also, response rates to future follow-up activities may be improved by informing present learners of the purpose of follow-up study, showing how the follow-up is conducted and the results used, and by stressing the importance of their future cooperation in this effort.

IV. Summarizing and Using the Report

A. Once an acceptable number of returns is received, the responses will need to be tabulated and summarized. This tabulation may be done by hand or through the use of a computer. The decision to use either approach will largely be determined by the number of returns, the type of responses sought (i.e., open-ended vs. forced choice items) and the amount of time and resources available.

B. The summary data should be presented in a brief, easy to understand manner so that the persons receiving the report can get a clear picture of: 1) the purpose of the follow-up, 2) the method used to collect the information and 3) the results of the follow-up. Pictorial displays of the data are suggested. Straight tallies, percentages, histograms, bar graphs and/or averages can be used in these displays.

C. The results of the follow-up are of limited value unless they are used for program review and improvement. Procedures for reviewing the data and for formulating conclusions and recommendations should be an integral part of the follow-up process. The procedures to be used will depend upon the scope of the survey:

- If the follow-up involves all vocational programs, the results of the follow-up should be reviewed by all vocational staff members and personnel responsible for providing supportive services. Both vocational and supportive services personnel should also be given an opportunity to review the conclusions and to make recommendations for program improvement. Example Document #5 presents a sequence of events that can be followed in organizing and implementing a system-wide follow-up study of former special needs learners. Suggestions for compiling and utilizing the results are also provided.

- If the follow-up involves a select program or programs, then the program instructor(s) will likely be responsible for conducting the follow-up activity. The instructor should work closely with supportive service personnel and his/her immediate supervisor during all phases of follow-up, but especially during the time when the results are being analyzed and the specific recommendations are to be made. By involving these persons in the follow-up, the instructor will have a means for checking her/his results, conclusions and recommendations and also have a built-in process for communicating program needs and concerns. Example Document #5 offers a format for reporting follow-up results, conclusions and recommended actions.

FOR FURTHER INVESTIGATION

For additional information on the topic of conducting follow-up of former students see:

Davis, Dwight and Borgen, Joe. Planning, Implementing and Evaluating Career Preparation Programs. Bloomington, Illinois: McKnight Publishing Company, 1974.

Erickson, Richard C. and Wentling, Tim L. Measuring Student Growth: Techniques and Procedures for Occupational Education. Boston, Mass.: Allyn and Bacon, Inc., 1976.

Mason, Ralph E. and Haines, Peter G. Cooperative Occupational Education and Work Experience in the Curriculum. Danville, Illinois: The Interstate Printers and Publishers, Inc., 1972.

Meyer, Warren G.; Crawford, Lucy and Klaurens, Mary K. Coordination in Cooperative Vocational Education. Columbus, Ohio: Charles E. Merrill Publishing Company, 1975.

Phelps, L. Allen. Instructional Development for Special Needs Learners: An Inservice Resource Guide. Urbana-Champaign, Illinois: Department of Vocational-Technical Education, University of Illinois, 1976 (ED 133-940).

Wentling, Tim L., Project Director. Student Follow-up Survey. In Locally-Directed Evaluation: Handbook 1. Springfield, Illinois: Department of Adult, Vocational and Technical Education, Illinois Office of Education, 1976.

Wentling, Tim L. and Lawson, Tom E. Evaluating Occupational Education and Training Programs. Boston, Mass.: Allyn and Bacon, Inc., 1975.

EXAMPLE DOCUMENT #1

SPECIAL CONSIDERATIONS IN DEVELOPING FOLLOW-UP INSTRUMENTS*

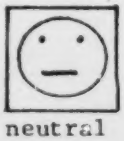
-- *Preparing the directions, questions, or items*

- Keep the vocabulary and language simple and concise
- Keep the sentence length short
- Attempt to use words/phrases that will not require finger spelling by interpreters for the deaf
- Consider alternative forms for the instrument, such as putting the questions on a cassette tape, brailling the instrument, large print, or translation of the instrument to a native language

-- *Selecting the rating or response format*

- Consider using nonverbal scales

positive


neutral

negative

- Use large response boxes for those who have difficulty with fine motor coordination
- Consider using a tape recorded series of questions where students can stop the recorder and orally respond or by brailling their response

*Adapted from L. A. Phelps. Instructional Development for Special Needs Learners, Department of Vocational-Technical Education, University of Illinois, 1976, p. 318 (ED 133-940).

EXAMPLE DOCUMENT #2

Student Evaluation of Pilot-test Follow-up Survey*

Name _____ Date _____

Would you please take a few minutes to answer the following questions.

1. How long did it take you to fill out the survey?

2. Was it:

   _____ Too short

   _____ Too long

   _____ Acceptable in length

3. Would you have filled out the survey if you had not received a personal call from your teacher?

   _____ Yes

   _____ No

4. Were there any questions that were confusing or difficult to answer?

   _____ Yes

   _____ No

   If yes, which questions and why?

5. Can you think of any areas that were not covered on the survey that you would like to comment on--criticisms, praise or concerns?

*Developed and used in District 204, Joliet Township High Schools, Joliet, Illinois.

EXAMPLE DOCUMENT #3

Sample Cover Letter for a
Student Follow-up Questionnaire*

(school letterhead)

Dear (first name)_____

I am writing this letter to you and your fellow classmates who participated in the I.C.E. program at Lincoln East for two reasons. First, I am interested in finding out how my former students are doing, and second, I am trying to gather information that will help improve the I.C.E. program. The comments you and other students make will identify areas for improvement and change.

Please complete the attached questionnaire and return it in the enclosed envelope.

Don't be frightened by the apparent length of the questionnaire. Most of the responses only require a check mark or a brief response. The whole questionnaire should require no more than 15 minutes to complete.

I am looking forward to hearing from you. Your assistance is greatly appreciated.

Sincerely,

Richard Meyers
I.C.E. Coordinator

Note: Comparable introductory information should be communicated if a personal interview or a telephone interview is used for gathering follow-up data.

*Adapted from Joliet Township High Schools #204, Joliet, Illinois.

FORMER STUDENT SURVEY QUESTIONNAIRE*

Evaluation of Special Needs Services

1. NAME: Rick Wasoman Birthdate 4-11-56 Age 21 Sex M

2. ADDRESS: R.R. #2 City Princeton Zip 53531 Phone 239-0967

3. Please check your present status:

___ Part-time student/ part-time employed

X Employed full-time

___ Full-time student

___ Armed Forces

___ Apprentice training

___ Housewife

___ Unemployed, looking for work

___ Unemployed, not looking for work

X Other, please describe: Part-time student at Laurel Hills Community College

4. If employed, describe the work you are presently doing: Heavy equipment, truck driving, general labor at Portage County maintenance Division

5. How long have you been employed? 2 1/2 years

6. Please list any previous work:

Place of Employment	Dates
Allers Grocery	Part-time during high school

7. Which of the courses you took in high school were most helpful to you in your present job?

Art, auto Repair, Woodworking

8. Why do you feel these courses were helpful? Each one taught me skills I've been using on my job

9. What part of your high school vocational program was of least value to you? Explain why: All were important and I think if I had a chance I would have taken more of them, such as Basic Electricity

*Format reprinted from Instructional Development for Special Needs Learners by L. Allen Phelps, University of Illinois, 1976, pp. 321-322. Adapted for use by Albia High School, Albia, Iowa, 1977-78.

10. Check the services you received while you were a student at Princeton. If you check a service, please rate its value to you by circling a number on the right.

		No Value	Some Value	Very Valuable
X	Counseling	1	2	(3)
____	Social worker	1	2	3
____	Nurse	1	2	3
____	Summer Math and Reading	1	2	3
____	Interpreter	1	2	3
____	Reading Lab	1	2	3
X	Job Placement Assistance	1	2	(3)

11. After having taken the vocational courses I found that:

a) I had the training necessary to get my job ___X___ yes ____ no (but needed more)

b) I had enough training to advance in my job ___X___ yes ____ no

c) My job is one that matches my ability ____ yes ___X___ no

d) I received enough information on how to fill out a job application ___X___ yes ____ no

e) I received enough information about how to prepare for an interview ___X___ yes ____ no

12. Did you graduate? ___X___ yes ____ no

13. If no, what grade did you complete? ____ 9 ____ 10 ____ 11

14. If you left school before graduation, what were your reasons?

---

15. Do you need additional vocational training? ___X___ yes ____ no

16. If yes, please describe the type of vocational training you need: I'm taking Machine Trades Instruments and Drafting at Laurel Hills now. I plan to take Basic Electricity and Blueprint Reading next semester so that I can have preparation for a better job in the future.

EXAMPLE DOCUMENT #4

FORMER STUDENT INTERVIEW GUIDE*

Respondent's Name: _____

Year of Graduation: _____ Interviewer: 1 2

1. What is the name of the place where you work? _____

_____

2. What kind of work do you do at your job? _____

_____

3. How many hours per week do you work? _____

4. Do you feel that you do good work?
   - Yes 1
   - No 2
   - Pretty good 3

5. Is your work as good as other employee's work?
   - Better 1
   - Yes 2
   - Not as good. 3

6. Does your boss like your work?
   - Yes 1
   - No 2
   - Somewhat. 3

7a. Do you think ISD had enough vocational courses to choose from?
   - Yes 1
   - No 2

7b. What other courses would you have liked that they did not offer at ISD?

_____ _____

_____ _____

8. Did you have a chance to take courses at ISD that would help you in your job?
   - Yes 1
   - No 2

9. What did you like the most about ISD?
   - Classes 1
   - Counselors. 2
   - Instructors 3
   - On-the-job training . . .4
   - Other_____. . .5
     (please specify)

*Adapted from Instructional Development for Special Needs Learners by L. Allen Phelps, University of Illinois, 1976, pp. 323-324 (ED 133-940).

10a. Do you feel your ISD experience prepared you enough to go to junior college or some other job training school?

Yes 1
No 2

10b. What was lacking? _____

_____

11. Here is a rating scale. How would you rate the quality of the ISD vocational instructors?

Really good. 1
Good 2
Okay 3
Not too good 4
Bad. 5

12. What suggestions do you have for improving the ISD program? _____

_____

_____

EXAMPLE DOCUMENT #5

A SYSTEM-WIDE PROCEDURE FOR CONDUCTING A FOLLOW-UP OF FORMER SPECIAL NEEDS STUDENTS

1. Local administrator(s) prepares for an orientation meeting with all vocational instructors and support services personnel. This meeting is to explain the need for follow-up, procedures to be used and the time-lines for conducting the study.

2. Orientation meeting is conducted. A follow-up committee is appointed (4 to 6 members).

3. Follow-up committee defines scope and goals of the follow-up activity.

4. Selected staff develops instruments (or selects pre-existing instruments) and method(s) to be used for collecting the data.

5. Selected staff pilot tests methods and instruments.

6. Procedures are revised based upon pilot test results.

7. Follow-up is conducted.

8. The data are collected and tabulated.

9. Follow-up committee drafts preliminary report containing the results.

10. Follow-up committee meets with special interest groups to draft conclusions and recommendations. Special interest groupings would include: vocational staff members, supportive service personnel, general education staff members, administration, and vocational advisory council.

11. Preliminary report is prepared by follow-up committee summarizing the conclusions and recommendations and a staff meeting is held for the purpose of discussing and exchanging ideas in general relative to the report.

12. A final draft of the report is prepared by the follow-up committee and disseminated to the school board at a regular meeting and to the community through news media.

13. Instructors, special service personnel and administrators follow through on report recommendations. A select committee should be established to monitor the plan for the purpose of assessing, on a periodical basis, the extent to which the recommendations have been met. Monitoring could include quarterly written reports by staff indicating changes made in classroom operation or modification of lesson plans.

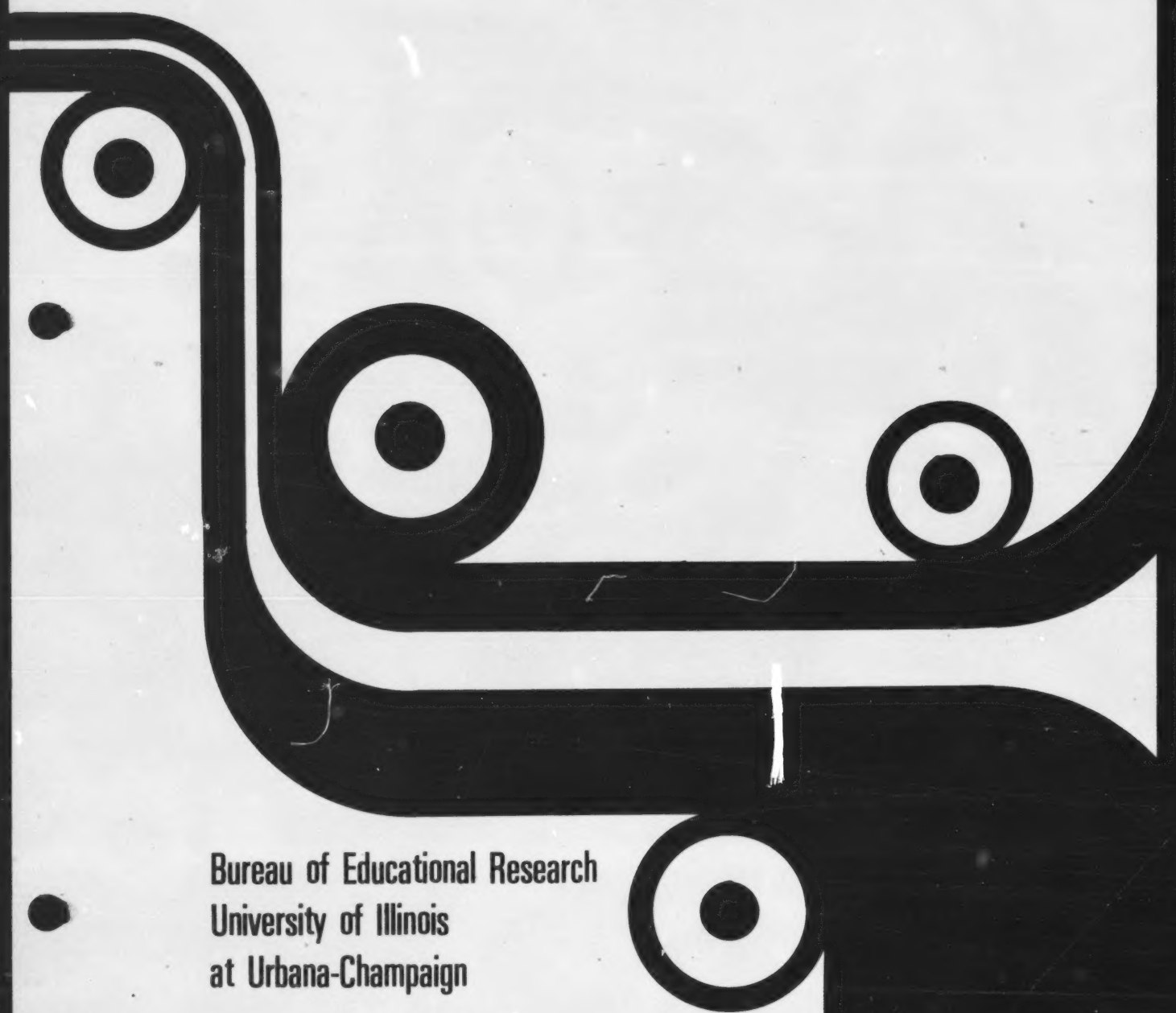
EXAMPLE DOCUMENT #6

SUMMARY REPORT ON THE FOLLOW-UP
OF FORMER SPECIAL NEEDS STUDENTS

Follow-up Question	Results	Conclusion	Recommended Action	Personnel Responsible

9

CONDUCTING EMPLOYER FOLLOW-UP



Bureau of Educational Research
University of Illinois
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9

INSTRUCTOR'S GUIDE

CONDUCTING EMPLOYER FOLLOW-UP

Len Albright

Special Needs Identification and Assessment Project
Bureau of Educational Research
University of Illinois
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#2 Employer Follow-up Survey (General).....10

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#4 Employer/Supervisor Survey Cover Letter.....14

The report presented herein was prepared pursuant to Grant No. OEG007604835 from the Bureau of Occupational and Adult Education, U.S. Office of Education, Department of Health, Education and Welfare. The opinions expressed herein, however, do not necessarily reflect the position or policy of the U.S. Office of Education and no official endorsement should be inferred.

INTRODUCTION

This guide offers several tips for organizing and conducting an employer follow-up. The employer follow-up is basically used as a checkpoint for comparing the skills taught in the vocational course with those required on-the-job. By collecting this type of information, the vocational instructor is better able to design a program which reflects the skills necessary for successful occupational employment and advancement. Another important reason for the employer survey is to assess the performance of former special needs learners. By matching this information with the results of the student follow-up (Guide 8), the instructor has a more comprehensive means for determining student and program needs. Additional reasons for conducting an employer follow-up might include: (Wentling and Lawson, 1975)

- To determine how specific program graduates compare with graduates of other training programs
- To elicit recommendations for improving the vocational program
- To determine the recruitment practices of employing agencies
- To estimate supply and demand for individuals in particular occupations
- To improve public relations between the school and the business community

GUIDELINES AND CONSIDERATIONS*

The following information will take you through three major stages for conducting the employer follow-up: 1) planning the follow-up,

*Most of the procedures suggested herein came from two sources:

Davis, Dwight and Borgen, Joe. Planning, Implementing and Evaluating Career Preparation Programs. Bloomington, Illinois: McKnight Publishing Company, 1974.

Wentling, Tim L., Project Director. Employer Follow-up Survey. In Locally Directed Evaluation: Handbook 1. Springfield, Illinois: Division of Adult, Vocational and Technical Education, Illinois Office of Education, 1976.

2) administering the follow-up procedure(s), and 3) summarizing and utilizing the outcomes. Suggestions for completing each stage are provided.

I. Planning for the Follow-up

A. The goals of the follow-up will need to be determined. Is the purpose of the survey to obtain employer reaction to the skills currently being taught? Is the purpose to get a reading on former student performance? Does the follow-up include both goals and/or others?

B. The scope of the follow-up will also need to be identified. Will the follow-up include only graduates from last year's class? Or, will it include graduates from the past five years? Will the follow-up involve one, several, or all vocational courses? Will all former special needs learners, both graduates and dropouts, be included in the survey?

C. Develop the major evaluative questions to be addressed in the survey. For example:

- To what extent are the competencies taught within the vocational program in line with those required for on-the-job performance?
- How well do former students compare with other new employees who had other training?
- What competencies are former students lacking?
- What recommendations do employers present for program improvement?

D. Break down the major questions into specific criterion questions or items to be included in the employer survey. For instance, the broad question, "How do employers rate the performance of program graduates?" could be broken down into the following sub-questions:

-- compared to other employees?

-- relative to the time they began?

-- on specific knowledges, skills and attitudes?

-- on their potential for promotion?

Example Document #1 illustrates an employer survey which asks for a rating of employee performance in general job traits and also in specific occupational skill areas. This type of survey is appropriate for a specific occupational skill training program. If, however, the survey is based on a pre-vocational or a general work-experience program, or if it is to be used for more than one

program area, then a general survey would be more appropriate. Example Document #2 provides an example of a general survey instrument design.

E. Determine the method to be used in conducting the employer follow-up. Three methods may be used: 1) the mail questionnaire, 2) the personal interview, and 3) the telephone interview. When considering which survey method to use, three factors will be involved: 1) the number of persons to be surveyed, 2) the quantity and quality of information desired, and 3) the cost of obtaining the necessary information. If the numbers of persons to be surveyed is large, then the mail questionnaire is probably the most efficient method. However, the response rate on mail questionnaires is often low. Interviewing, particularly personal interviews, will likely yield the most usable information, but, if the numbers are high, the cost may be prohibitive.

F. The instrument should be reviewed by staff and/or advisory committee members for suggestions on content and format.

G. Administer the instrument to a select group of employers and ask them to mark any items that are ambiguous. Example Document #3 provides a completed sample of a form used for obtaining employer feedback on a pilot-test survey.

H. Revise the instrument, based on staff, advisory committee and/or employer feedback.

I. If a mail questionnaire is to be used, the former student's name will need to appear on the instrument. There is no need to identify the student as a former special needs learner.

II. Administering the Follow-up Instrument

A. Identify the employers who will be surveyed. If a student follow-up was conducted prior to, or concurrently with the employer survey, this may be the source of information.

B. If a mail questionnaire is being used, a cover letter will need to accompany this instrument. A sample cover letter is located in Example Document #4. Also, be sure to code the instruments with a number corresponding to the list of employer names.

C. A follow-up on nonrespondents may be necessary. This can be accomplished by: 1) mailing a reminder card, 2) sending a second cover letter and instrument, and 3) telephoning or visiting those who did not respond to the first request.

D. If the interview method is used, employers should be contacted prior to the actual interview to set up an interview time convenient for both parties.

III. Summarizing and Utilizing the Outcomes

A. The tally of responses may be done manually or by the use of a computer, depending on size of population surveyed and available resources.

B. A follow-up committee should summarize the results. This summary should include an explanation of how the data were collected and for what purposes. This summary should be presented in a simple, nontechnical, easy to understand manner.

C. Follow-up committee meets with special interest groups to draft conclusions and recommendations. Special interest groupings would include: vocational staff members, supportive service personnel, general education staff members, administration, and vocational advisory council.

D. Preliminary report is prepared by follow-up committee summarizing the conclusions and recommendations and a staff meeting is held for the purpose of discussing and exchanging ideas in general relative to the report.

E. A final draft of the report is prepared by the follow-up committee and disseminated to the school board at a regular meeting and to the community through news media.

F. Instructors, special service personnel and administrators follow through on report recommendations. A select committee should be established to monitor the plan for the purpose of assessing, on a periodical basis, the extent to which the recommendations have been met. Monitoring could include quarterly written reports by staff indicating changes made in classroom operation or modification of lesson plans.

FOR FURTHER INVESTIGATION

For additional information on conducting employer follow-up see:

Brolin, Donn E. Vocational Preparation of Retarded Citizens. Columbus, Ohio: Charles E. Merrill Publishing Company, 1976.

Davis, Dwight and Borgen, Joe. Planning, Implementing and Evaluating Career Preparation Programs. Bloomington, Illinois: McKnight Publishing Company, 1974.

Erickson, Richard C. and Wentling, Tim L. Measuring Student Growth: Techniques and Procedures for Occupational Education. Boston, Mass.: Allyn and Bacon, Inc., 1976.

Meyer, Warren G.; Crawford, Lucy and Klaurens, Mary K. Coordination in Cooperative Vocational Education. Columbus, Ohio: Charles E. Merrill Publishing Company, 1975.

Wentling, Tim L., Project Director. Employer Follow-up Survey. In Locally-Directed Evaluation: Handbook I. Springfield, Illinois: Department of Adult, Vocational and Technical Education, Illinois Office of Education, 1976.

Wentling, Tim L. and Lawson, Tom E. Evaluating Occupational Education and Training Programs. Boston, Mass.: Allyn and Bacon, Inc., 1975.

EXAMPLE DOCUMENT #1

Employer Follow-up Survey (Specific)

Farm Equipment Mechanic Program*

NOTE: *The information reported in this survey will be used for occupational education planning purposes only, and the source of the information will not be divulged to any other agency or party.*

1. Name of employee _____
2. Name of employing organization _____
3. Mailing address _____
   (Number) (Street) (Town) (State) (Zip)
4. Telephone number _____
5. Name of person completing form _____
6. Your position or title _____
7. Total number of employees in your organization or business _____
8. The major function of this business _____
9. Job performed by above named employee _____

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10. Please rate each of the general traits of this employee below. Circle the rating on the scale to the right of each trait: _____

	GENERAL TRAITS	Below Average			Average			Above Average		
A.	Integrity: Trustworthiness, honesty, and loyalty.	1	2	3	4	5	6	7	8	9
B.	Dependability: Promptness and reliability in attendance.	1	2	3	4	5	6	7	8	9
C.	Responsibility: Willingness with which work is accepted and performed.	1	2	3	4	5	6	7	8	9

*This form was developed and used by Wabash Valley College, Mount Carmel, Illinois. Reprinted from Davis, Dwight and Borgen, Joe, Planning, Implementing and Evaluating Career Preparation Programs. Bloomington, Illinois: McKnight Publishing Company, 1974, pp. 409-411. Used with permission of McKnight Publishing Company.

		Below Average			Average			Above Average		
D.	Initiative: Ability to plan and direct own work.	1	2	3	4	5	6	7	8	9
E.	Judgment: Ability to make sound decisions.	1	2	3	4	5	6	7	8	9
F.	Cooperation: Ability to work in harmony with others.	1	2	3	4	5	6	7	8	9
G.	Leadership: Qualities of understanding people and directing work of others.	1	2	3	4	5	6	7	8	9
H.	Attitudes toward work: Degree of enthusiasm with which one performs his or her work.	1	2	3	4	5	6	7	8	9
I.	Emotional stability: Poise and self-control.	1	2	3	4	5	6	7	8	9
J.	Courtesy and friendliness: Shows genuine consideration and kindness toward others.	1	2	3	4	5	6	7	8	9
K.	Personal appearance: Neatness, cleanliness, appropriate dress and grooming.	1	2	3	4	5	6	7	8	9

Comments:

11. Please rate the importance of each skill for job performance, and then rate the employee on each of the skills listed that apply to his or her work.

SKILLS FOR FARM EQUIPMENT MECHANIC and/or PARTSMAN.	Importance to Know*			Employee's Performance of Each Skill**			
	U	D	E	VA	A	I	CD
A. Gas engine tune-up							
B. Diesel engine tune-up							
C. Reface valves, grind seat, ream guides							
D. Crank shaft and bearing installation							

*U = Unnecessary
D = Desirable
E = Essential

**VA = Very Adequate
A = Adequate
I = Inadequate
CD = Cannot determine

		Importance to Know*			Employee's Performance of Each Skill**			
		U	D	E	VA	A	I	CD
E.	Sleeve, piston, and ring installation							
F.	Use of micrometers							
G.	Hydraulic pump repair							
H.	Hydraulic cylinder repair							
I.	Gear and power train shaft and bearing							
J.	Use of compression gauge							
K.	Use of vacuum gauge							
L.	Locate and correct ignition malfunction							
M.	Locate and correct malfunction in the carburetor							
N.	Locate and correct malfunction in diesel injection pump							
O.	Use of electrical system test equipment							
P.	Use hydraulic system tester							
Q.	Isolate diesel engine problems							
R.	Remove and rework diesel pumps, nozzles and injectors							
S.	Understand need for special tools and test equipment							
T.	Use service manual							
U.	Follow equipment set-up and adjustment instructions							
V.	Inventory and stock control							
W.	Receiving, marking, and binning							

	Importance to Know*			Employee's Performance of Each Skill**			
	U	D	E	VA	A	I	CD
X. Customer relations							
Y. Salesmanship							
Z. Setting up window and store displays							

12. Please list the job skills you feel lacking in this employee other than those already listed.

13. Are there any weaknesses of this employee which now affect or have affected his or her job performance?

14. Is this employee capable of advancement in your business without additional training? Yes _____ No _____.

15. What recommendations would you make to us for improving the job skills of future employees?

16. Other comments:

EXAMPLE DOCUMENT #2

Employer Follow-up Survey (General)*

Please return by *(date)* .

To the Employer or Supervisor of: _____

1. In what capacity are you related to the employee? (check one)

_____ Employer _____ Supervisor _____ Other _____
(write in)

2. What is the job title of this employee's position? _____
(Job Title)

3. Please check the following:

	Yes	No	Questionable
A. Person exhibits adequate pre-employment skills (application and interview).			
B. Person's cooperation toward work, company, supervisors, and co-workers is good.			
C. Person's (1) attendance; and (2) punctuality is good.	(1) (2)		
D. Person's (1) personal appearance; and (2) hygiene is good.	(1) (2)		
E. Person shows initiative on the job (eagerness to do what needs to be done).			
F. Person's quality of work meets acceptable standards.			
G. Person's quantity of work under normal conditions is acceptable.			
H. Person's knowledge of the job is adequate.			
I. Person's ability to learn new skills and job duties is adequate.			
J. Person readily accepts advice and criticism.			

*Sections adapted from surveys designed and used in Cooperative Work Training Programs at Neoga High School, Neoga, Illinois and Joliet Central High School, Joliet, Illinois, 1977-78.

	Yes	No	Questionable
K. Person exhibits proper use of tools and/or equipment.			
L. Person is dependable--completes jobs thoroughly with little or no supervision.			
M. Person talks to the boss about job related problems.			
N. Person exhibits safe working habits.			
O. Person follows company rules.			
P. Person exhibits adequate social behaviors/skills to deal with public and/or supervisors and co-workers.			

4. How would you evaluate this person generally as an employee?

_____ Outstanding _____ Above Average _____ Average

_____ Below Average _____ Poor

5. Advancement

A. Is there an opportunity for this person to move to a better position in your company? _____ Yes _____ No

B. If yes, to what position _____

C. Has this person ever been promoted to a better position within your company? Yes _____ No _____

D. If yes, from _____ to _____

E. Do you foresee this person going to a more responsible position in the future? Yes _____ No _____

F. If no, what is the reason for this person not being promoted?

_____

6. General Comments

A. Regarding this person's performance as your employee:

B. Regarding suggestions for improving our Cooperative Work Program:

EXAMPLE DOCUMENT #3

Employer Feedback Form for
Pilot Test Survey*

Employer: Bill Knight Firm: Basic Design Inc.

Would you please take a few minutes to answer the following questions.

1. How long did it take you to fill out the survey?
   10 minutes

2. Was it:

   ____ Too short

   ____ Too long

   _X_ Acceptable in length

3. Would you have filled out the survey if you had not received a personal call from the instructor?

   _X_ Yes

   ____ No

4. Were there any questions that were confusing or difficult to answer?

   ____ Yes

   _X_ No

   If yes, which questions & why?

5. Can you think of any areas that were not covered on the survey that you would like to comment on--criticisms, praise or concerns?
   If you could limit the number of pages to two, I am sure that more people would reply.

*Adapted from instrument used by Industrial Cooperative Education and Cooperative Work Training Programs, Joliet Township High Schools, Joliet, Illinois, 1978.

EXAMPLE DOCUMENT #4

Employer/Supervisor Survey Cover Letter*

(use school letterhead)

Dear _____:

We need your help. We are currently conducting a study to evaluate the effectiveness of the Cooperative Work Training (CWT) program we offer to Joliet Township High School students. As an employer of one or more of our former students, we would like to ask a favor of you.

We have enclosed a short survey form which can be filled out in approximately 10 minutes. By your answers, we hope to identify the strengths and weaknesses of our present CWT program. This information will be helpful in improving the training of future CWT students.

No employer, employee, or supervisor will be identified in the results of the study, and all responses will be kept in complete confidence.

Please return the completed questionnaire in the stamped, self-addressed envelope by April 10, 1978.

Thanks so much for all your help!

Sincerely yours,

*Adapted from Joliet Township High Schools, District #204, Joliet, Illinois.